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Abstract & Fulltext
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2025





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ICONSR 2025

International Conference on Social Science Research

May 28-30, 2025 in Budapest - HUNGARY



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Dear Readers;

The 8th of ICONSR organization was held in Budapest/Hungary between May 28-30, 2025. ICONSR organizations aim to provide and encourage interdisciplinary interaction by bringing together scientists from all disciplines of social sciences. We try to provide a discussion and meeting environment for those working in the field of social sciences to share their research findings and thoughts, and to evaluate the latest developments in social sciences.

This year, 70 papers from different 10 countries (Albania, Azerbaijan, Georgia, Hungary, Kazakhstan, Kosovo, Montenegro, Pakistan, Romania and Türkiye) presented by scientists in ICONSR organizations. Turkey is the country with the highest participation with 44%, followed by Hungary with 30%, Romania and Montenegro 6%, Azerbaijan, Georgia, Kosovo and Pakistan 3%. Outside of Türkiye participant rate is totally 56%.

As ICONSR organizations, we will continue to organize organizations with the value you deserve in order to exchange ideas against the greatest threat facing humanity, to inspire each other and to contribute to science. See you at your future events.

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Analysis Of Primary School Students' Screen Addiction And Bullying Levels

ESEN SPAHI KOVAC*¹, MERAL HASKUKA²

Abstract: The aim of this study is to examine the screen addiction and bullying levels of primary school students. In the study, the screen addiction levels of children were determined based on parental perceptions, while their bullying levels were determined based on student perceptions. The participants of the study consist of 4th and 5th grade primary school students receiving education in Turkish and their parents at Abdyl Frashëri and Emin Duraku Primary Schools, which are affiliated with the Ministry of National Education in the city of Prizren, during the 2024-2025 academic year. In this study, conducted using the quantitative research method, data were collected through the Problematic Media Use Scale-Parent Short Form developed by Furuncu (2019), the Bullying Tendency Scale developed by Dölek (2005), and the Personal Information Form developed by the researcher. According to the findings obtained from the study, it was concluded that the participating parents do not perceive visual media tools as addictive devices or platforms for their children. According to parents' perceptions of their children's problematic media use, it was concluded that children do not secretly use visual media tools, that visual media tools are not the only thing they turn to when they are in a bad mood, that they use visual media tools during the time allowed by their families without pressuring the family for more time, and that there are no issues within the family regarding the use of visual media tools, with no negative impact on family relationships. When examining the bullying levels of the 4th and 5th grade primary school students who participated in the study, it was found that their bullying levels were not high. When evaluating the general bullying perceptions of the child participants in the study, it was concluded that the majority of students try to resolve issues with their friends through conversation rather than fighting, avoid using physical force or hurting their friends, and do not engage in behaviors such as upsetting their peers, mocking them in situations of weakness, or giving them any nicknames.

Keywords: Primary school students, Screen addiction, Bullying

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The Impact of Pakistan's Political Turmoil, Injustice and Human Rights Violations on its Citizens

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Abstract: Pakistan's political instability, systemic injustice, and widespread human rights violations have significantly affected its citizens' lives, undermining their well-being, trust in institutions, and fundamental freedoms. This paper examines the interconnected consequences of these challenges on Pakistan's population, focusing on the socio-economic, psychological, and civil dimensions. Political turmoil, characterized by frequent regime changes, poor governance, and corruption, has led to economic uncertainty, inflation, and unemployment, leaving millions struggling to meet basic needs. Systemic injustices, including the erosion of judicial independence and inequality before the law, have deepened public disillusionment and fostered widespread distrust in the state's ability to provide justice. Additionally, pervasive human rights violations, such as restrictions on free speech, enforced disappearances, and persecution of minority groups, have stifled democratic expression and created an environment of fear and oppression. These issues have not only eroded people's confidence in their country's leadership but also exacerbated social divisions, particularly among marginalized communities. This study employs a mixed-methods approach, combining quantitative surveys and qualitative interviews with citizens across different regions of Pakistan. Findings reveal the far-reaching impact of these challenges on mental health, civic engagement, and societal cohesion. The paper concludes by urging policymakers to prioritize structural reforms, strengthen democratic institutions, and ensure accountability to address the root causes of instability and injustice. A rights-based governance framework is critical to restoring public trust and creating a more inclusive, equitable society. The insights from this study underscore the urgent need for national reconciliation and systemic change.

Keywords: Human Rights Abuses, Legal Turmoil, Pakistan, Political Instability, Systemic injustices

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Determining Students' School Readiness Levels Through Parental Involvement

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Abstract: The aim of this study is to examine the effects of parental involvement on students' school readiness levels. The research evaluates the relationship between parents' participation in the educational process and children's social, emotional, and academic development. The main problem addressed is to reveal the impact of the types and levels of parental involvement on students' readiness for school. The study was designed using a quantitative research method, and data were collected through a standardized scale. The sample consisted of parents of 1st to 4th grade students attending primary schools in Prizren. A total of 101 parents participated in the study, and the collected data were analyzed using the SPSS statistical package. Findings indicate that parental involvement has a positive effect on students' readiness for school. Parental education level, the learning environment provided at home, and the availability of educational materials were identified as significant factors. It was found that children of parents with a high school education or higher demonstrated greater academic readiness. While mothers were observed to be more actively involved in the process, fathers' participation also contributed significantly to children's overall success. In conclusion, parental involvement not only enhances academic achievement but also supports students' social and emotional development. Therefore, it is recommended to implement practices that encourage parents to participate in their children's educational process more consciously and actively.

Keywords: Parental involvement, School readiness.

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The present study explores the impact of internship experience on perceived professional competence

ASENA ERDOĞAN¹, HAMZA KANDEMİR²

Abstract: This study sets out to examine the impact of internship experience on perceived professional competence, considering the moderating role of professional commitment. Internships have been shown to play a critical role in professional development by bridging the gap between academic knowledge and practical application. However, the extent to which internship experience enhances perceived competence may vary depending on individuals' level of professional commitment. Using Structural Equation Modeling (SEM), this study analyses the relationship between internship experience, perceived professional competence, and the moderating effect of professional commitment. We will collect data through a survey that will be administered to university students and recent graduates who have completed internship programs. The findings will contribute to both academic literature and practical implications for internship program design, emphasizing the role of professional commitment in shaping the effectiveness of internships. The study's results may be of interest to educators, policymakers, and employers seeking to optimise internship programmes to enhance professional readiness and career development.

Keywords: Internship Experience, perceived professional competence, professional commitment, Structural Equation Modeling (SEM)

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Evaluating the Role of Women in the Digital Ecosystem from a Business Management Perspective with Multi-Criteria Decision Making Methods

HANDE EREN*¹, GÖZDE SUNMAN²

Abstract: When women's presence in the digital ecosystem is evaluated from a business management perspective, many important dimensions such as leadership, entrepreneurship, employment, digital transformation and innovation processes come to the fore. This issue is critical to ensure women's increased participation in the digital economy, promote gender equality in the business world and support sustainable growth. Digitalization offers significant opportunities to address gender inequality and increase women's participation in the workforce. To assess women's position in the digital sphere, Multi-Criteria Decision Making (MCDM) methods allow understanding the relationship between factors such as digital skills, employment and internet usage by analyzing different factors together and developing policy recommendations for countries. In this context, the aim of this study is to evaluate the presence of women in the digital space in the European Union (EU) with Multi-Criteria Decision Making methods. The data used in the study was obtained from the Women in Digital Scoreboard Report published by the European Commission in 2024. The main purpose of the report is to measure the level of development in women's digital skills, to raise awareness on gender equality and to provide policy recommendations to encourage more women to take part in the digital space. In this context, three main criteria, namely Use of Internet, Internet User Skills and Specialist Skills and Employment, were weighted with the Entropy method and all European countries included in the report were ranked and evaluated with the ARAS (Additive Ratio Assessment) method. According to the results obtained with the Entropy method, the criterion with the highest degree of importance was the Specialist Skills and Employment criterion. According to the results obtained with the ARAS method, the countries with the highest level of women's presence in the digital field are Denmark, Ireland and Estonia, while the countries with the lowest level are Slovakia, Romania and Bulgaria. Examining the role of women in the digital ecosystem from the perspective of business management is important in terms of creating gender equality-based policies, supporting women's entrepreneurship and increasing women's employment in the digital economy. It is thought that businesses and policymakers will benefit from developing strategies to encourage women's active participation in digitalization processes in terms of sustainable growth and social development.

Keywords: Women in Digital Scoreboard, Multi-Criteria Decision Making, Entropy Method, ARAS Method

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The Posthumanist Echoes In *The Secret Of The Machines* By Rudyard Kipling

ÖZGE ÖZGÜN*¹

Abstract: The Industrial Revolution fundamentally transformed the relationship between humans and technology, leading to the development of a new mode of existence in which humans and machines became increasingly interconnected. From a posthumanist perspective, this transformation has prompted humans to transcend their biological and cognitive limits by integrating with technology, thereby challenging traditional anthropocentric thought. Posthumanism examines the human-machine relationship not merely in functional terms but within ethical, ontological, and existential frameworks. In this context, Rudyard Kipling's poem "The Secret of the Machines", published in 1911, can be regarded as a literary exploration of humanity's position in relation to technology. In the poem, machines are depicted not only as tools in the service of human beings, but also as beings that declare their own existence and have the potential to transcend human limits. This representation disrupts the hierarchical structure between humans and machines, aligning with key arguments in posthumanist discourse. By emphasizing both the benefits and potential dangers of machines, the poem parallels contemporary debates on artificial intelligence and biotechnology, particularly concerning their impact on human labor and decision-making processes. This study demonstrates that reflections on the role of machines in human society began much earlier than commonly assumed. Furthermore, it reevaluates Kipling's poem not solely as a product of the Industrial Revolution but as a text that questions human dominance over technology and anticipates the posthumanist transformation. Ultimately, this research highlights how literature shapes posthumanist thought and reconsiders the evolving dynamics of human-machine interactions.

Keywords: Artificial intelligence, human-machine relationship, literature and technology, posthumanism, Rudyard Kipling, *The Secret of the Machines*

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Young Socrates: How Children's Questions Shape Early Lexical and Conceptual Development

JOANA TAÇI*¹, ZAMIRA BOBOLI¹

Abstract: The aim of this paper is to explore how children, during the initial stages of first language acquisition, construct their lexicon and develop meaning. It focuses on children's innate tendency to ask questions as a primary mechanism in the early development of lexical and conceptual knowledge. This natural question-asking predisposition is viewed as an early reflection of the Socratic method, emphasizing the role of questioning in cognitive and linguistic growth. In addition, this approach aligns with Saussure's theory that meaning is not inherent but constructed through social interaction. It highlights how children's Socratic questioning facilitates their understanding of the arbitrary relationship between the signifier and the signified, contributing to a more solid and reflective comprehension of their mother tongue lexicon. In conclusion, this paper aims to intertwine two influential theories—Socratic questioning and Saussure's semiotics—demonstrating their relevance in explaining the processes underpinning early language development.

Keywords: Socrates questioning, first language acquisition, lexical development, Saussure semiotics, arbitrary nature of signs.

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A Study on Online Gambling Addiction Among Young People

H. BULUTHAN ÇETİNTAŞ*¹, MUSTAFA KOCAOĞLU²

Abstract: Gambling is an activity consisting of various games based on betting, luck, skill and it has many types. The situation where an individual has an excessive desire to gamble, cannot stop gambling, and cannot control himself is called gambling addiction. Gambling addiction, which starts with seemingly innocent reasons such as emotional satisfaction, stress relief, having a good time, excitement, causes serious psychological, social, and financial problems on the person and negatively affects the person's quality of life. The subject of the study, virtual gambling addiction, is turning into a problem worldwide by exceeding known criteria such as the level of development of the country, wealth, poverty and is distinguished from other types of gambling by its rapid spread in recent years. Today, when access to the internet has become easier, people of all ages can access the internet 24/7 via smartphones. This means that the internet is at the center of daily life for most young people. Virtual gambling and its effect on young people are a growing source of concern because the online environment prepares a suitable ground for gambling and makes gambling easily accessible. Indeed, virtual gambling, which is presented attractively on the internet, reaches young people in different ways and forms with glamorous opportunities. It offers and provides them with the opportunity to gamble in the comfort and safety of home. There aren't enough academic studies about online gambling addiction. This study was conducted to draw attention to this problem, the subject will be evaluated with important aspects such as the definition of the concept of online addiction, the reasons, addiction risks, negative effects on young people, legal, preventive studies, and ethical situations related to the subject, and measures that can be taken to protect young people from the potential dangers of online gambling.

Keywords: Internet, Addiction, online gambling, gambling addiction.

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Trust And Security In The Digital Revolution In School Education

CSABA BERÉNYI¹, ÁGNES CSISZÁRIK-KOCSIR^{*2}

Abstract: With the proliferation of digital technologies and online space, the notion and issues of trust and safety are becoming increasingly important for school communities. The present research aims to explore students' and teachers' knowledge, attitudes and thoughts about the concepts of trust and safety in the online environment. The research used in-depth interviews to explore the views of people working and learning in the education sector. A key focus of our objectives was to investigate how and to what extent they perceive the risks and benefits of participating in the online space, and how they understand the role of trust and safety in the digital world. By analysing our research findings, we can contribute to the development of digital education and to raising awareness among students and teachers of the importance of safe participation and safety awareness in the online space.

Keywords: trust, safety, security, online space, safety awareness

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The Role Of Agile Culture And Skills In The Success Of Agile Organisations Across Generations

GÁBOR STERCZL¹, ÁGNES CSISZÁRIK-KOCSIR^{*2}

Abstract: The success of agile operations is highly dependent on the development of an agile culture. For this reason, the mindset and attitudes of employees and how we can shape them are key. The continuous reflection and development required by an agile approach and culture is key in today's fast-changing industrial environment. What are the theoretical and practical skills that help employees to engage and collaborate effectively. The ability to empathise, self-reflect and provide reflective feedback is also key to effective self-development and the success of feedback and development ceremonies. What do people working in agile companies think about the importance of these skills? In this study, we investigated how people in companies that have adopted and are using agile working perceive the importance of these skills.

Keywords: agility, generation, collaboration skills

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Food Purchasing Preferences In A Hungarian Sample

ANETT POPOVICS*¹, MONIKA GARAI-FODOR²

Abstract: The purchase and consumption of food plays a fundamental role in the functioning of the economy and society. Changes in prices and incomes influence purchasing patterns, which in turn affect production and markets. Community initiatives strengthen the local economy and social relations. Security of food supply is a priority for stable economic development. Global trends such as digitalisation and online shopping are transforming consumer habits. Food purchasing and consumption is therefore not only an individual choice, but also a process with economic and social impacts. In order for the food industry to play the right role in an economy, it is essential to understand consumer preferences and habits. The analysis of this is the focus of the present study.

When buying food, consumers make decisions based on various criteria such as price, quality, origin and health factors. Increasingly, consumers prefer local, fresh and organic products to support sustainability and the local economy. In contrast, price-sensitive shoppers often prefer discount and bulk products.

The main question of our research is what kind of preference system characterises Hungarian consumers when buying food, what aspects are prevailing in their purchasing decisions

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Keywords: food shopping, preference system, primary research

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The Impact of Digitalisation on Logistics

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Abstract: Digitalisation has brought about a major transformation in the logistics sector, fundamentally changing the way the supply chain operates, its efficiency and flexibility. The application of modern technologies such as big data analytics, artificial intelligence (AI), Internet of Things (IoT) and cloud-based solutions has enabled the acceleration of information flows, optimization of resources and real-time monitoring. With these new tools, logistics providers are able to reduce operational costs, increase delivery accuracy and improve the quality of decision-making. Robotisation and automated warehouse management further increase process efficiency while minimising the potential for human error. The impact of digitalisation not only increases efficiency but also improves the customer experience by making services more transparent and faster. However, digitisation also brings challenges, including data security issues, high technology investment costs and the need to retrain staff. The aim of this paper is to present the progress that digitalisation has made in logistics and the new opportunities and challenges that companies face in order to remain competitive.

Keywords: digitalisation, logistics, supply chain, competitiveness, technological innovation

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Risk Management Strategies in Supply Chains: Strategic Approaches and Solutions

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Abstract: Many companies' supply chains and processes have traditionally been designed based on a stable and predictable economic environment. However, increasing economic volatility requires a comprehensive and dynamic assessment of risk factors in order to reduce the vulnerability of supply chains to disruptive influences. Previous research has shown that in crisis situations, the success of companies is strongly influenced by their willingness to take risks and cooperate, their deep knowledge of corporate values, and their openness to innovation and renewal. It is crucial that the measures and tools used in supply chain management are harmonised with current and future risk management strategies. The development and application of appropriate metrics is essential for effective and efficient risk management.

Keywords: risk management, strategy, supply chain, solution

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The Benefits and Potential of Digitalisation

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Abstract: Digitalisation is one of the most influential technological processes of our time, fundamentally transforming the way we operate economically, socially and organisationally. The aim of this paper is to present the benefits and potential applications of digitalisation in the business sector, with a focus on collaboration and supply chains. One of the main benefits of digitalisation is efficiency gains, which can significantly reduce the burden on human resources through automation and artificial intelligence. In addition, digital technologies enable the rapid processing and analysis of large amounts of data, supporting decision-making and innovation. The rise of online platforms has also revolutionised remote working and education, opening up new opportunities for flexible and personalised learning and workflows. These are also having a positive impact on the way businesses operate. Digital transformation is not just a technological change, it is also a cultural change that requires appropriate education and awareness raising. With the right application of digitalisation, not only competitiveness can be increased, but also sustainable and inclusive development can be achieved, benefiting all groups in society. The aim of this study is to provide a comprehensive picture of the potential of digitalisation and to provide guidance for successful implementation. The scientific paper concludes with valuable recommendations.

Keywords: digitalization, innovation, partnerships, supply chains

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Using RPG Maker as a Digital Game Tool in Educational Environments

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Abstract: This study examines the impact of technological advancements on education and the use of Web 2.0 tools in educational settings. The research first outlines the general framework of technological developments and evaluates their reflections in the field of education. It discusses how traditional teaching methods have evolved through the digitalization and how the integration of digital tools into education contributes to learning processes. In this context, the role of Web 2.0 tools in education is analyzed, with a focus on tools that enable students to have more interactive learning experiences. While exploring the opportunities offered by Web 2.0 tools in education, studies related to these tools have also been reviewed, and findings in the existing literature have been evaluated. The main focus of this research, RPG Maker, is considered as a Web 2.0 application, and its potential contributions to instructional environments are discussed. RPG Maker is a game development tool that allows teachers and students to design digital games without requiring coding knowledge, thanks to its user-friendly interface. In this regard, it has been emphasized that RPG Maker can contribute to the applicability of digital game-based learning strategies in education. In conclusion, the integration of technology into education expands the use of various tools that support learning processes. Applications like RPG Maker, in particular, hold significant potential for creating student-centered and interactive learning environments.

Keywords: Educational technologies, WEB 2.0 tools, RPG Maker.

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Views of Outstanding Scientists on Science Education and Learning Environments

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Abstract: Evaluations on science education are generally shaped by the perspective of science educators and researchers and provide important contributions to the field. However, it is also necessary to consider the perspectives and experience-based reflections of researchers who have conducted important scientific studies in science. This research was conducted with this understanding and the opinions and suggestions of successful scientists on the purpose/importance of science education, general problems of science education in Turkey, ideal science learning environments and the place of nature of science in science education were examined. The data of the research conducted with a phenomenological design and consisting of nine scientists ranked among the world's top ten thousand scientists in their career fields were collected through face-to-face interviews. The obtained data were analyzed by following the stages of organizing, pre-reading, generating codes from the data, organizing the codes and grouping the codes. The findings obtained through the analysis of the data showed that the majority of the participants did not have a conceptual understanding of the nature of science, that they focused on the development of the competence of understanding nature and life as the purpose of science education, that they saw the most important problem area in science education as the teaching approach based on memorization, and that they focused on a student-centered learning environment supported by rich practices and activities in the ideal science classroom. The results obtained from these findings revealed that the evaluations and reflections made by scientists specialized in the field of science based on their personal experiences significantly overlap with the most of science education discussions expressed in the field education literature.

Keywords: Scientists, science education, learning environments.

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Food Purchasing Preferences In A Hungarian Sample

ANETT POPOVICS*¹, MONIKA GARAI-FODOR²

Abstract: The purchase and consumption of food plays a fundamental role in the functioning of the economy and society. Changes in prices and incomes influence purchasing patterns, which in turn affect production and markets. Community initiatives strengthen the local economy and social relations. Security of food supply is a priority for stable economic development. Global trends such as digitalisation and online shopping are transforming consumer habits. Food purchasing and consumption is therefore not only an individual choice, but also a process with economic and social impacts. In order for the food industry to play the right role in an economy, it is essential to understand consumer preferences and habits. The analysis of this is the focus of the present study.

When buying food, consumers make decisions based on various criteria such as price, quality, origin and health factors. Increasingly, consumers prefer local, fresh and organic products to support sustainability and the local economy. In contrast, price-sensitive shoppers often prefer discount and bulk products.

The main question of our research is what kind of preference system characterises Hungarian consumers when buying food, what aspects are prevailing in their purchasing decisions

We conducted a pre-tested standardised questionnaire survey as part of our primary research, which resulted in 2198 evaluable questionnaires from Hungarian respondents.

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Keywords: food shopping, preference system, primary research

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Taxation Practices As Barriers To Firm Innovation In Türkiye

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Abstract: Taxation is the key financial tool used by the government for regulatory purposes. However, it has the potential to restrict firm activities. One of the crucial firm operations in today's competitive ecosystem is innovation. In this context, tax practices may also affect the innovation behavior of firms. Therefore, this study aims to examine the effects of various taxation practices on firm innovation. A cross-section dataset covering 1,663 firms in Türkiye from 2019 is employed. Firm innovation is estimated using probit and logit models as a function of three tax indicators, in addition to R&D expenditure and other control variables. The tax indicators are based on the responses to the questions "Have you undergone a tax inspection?", "To what extent are tax rates a barrier to firm operations?", and "To what extent is tax management a barrier to firm operations?" asked to the firms. It is found that R&D expenditure significantly increases the probability of introducing an innovation across all specifications. Furthermore, firms that have undergone a tax inspection (compared to those that have not), firms that declare that tax rates are a barrier to their operations (compared to those that do not), and firms that declare that tax administration is a barrier to their operations (compared to those that do not) are significantly less likely to introduce innovations. Finally, the work discusses how tax practices can be applied to reduce their harmful effects on innovation.

Keywords: firm, innovation, microeconometrics, tax inspection, tax rates, tax administration

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Cognitive Linguistic Analysis Of Religious Media Discourse In Kazakhstani Online Space

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Abstract: The article is devoted to the cognitive linguistic study of religious media discourse in Kazakhstani online space. The aim of the study is to identify the dominant discursive strategies and speech tactics used in the creation of religious topics media texts as well as their influence on the formation of public consciousness and values. Special attention is paid to the analysis of media texts published by the state and independent Kazakhstani media as well as the international agencies represented in the region. The selection criteria are the level of citation, thematic relevance and reader response. The study considers texts that refer to religion in the context of national identity, legal and cultural norms as well as interaction with innovative technologies (genetic engineering, transplantation, and cryonics). The methodology includes media linguistics, media stylistics, semiotics and discourse analysis with the use of grammatical, semantic, pragmatic and rhetorical approaches. The authors give particular attention to the terms related to Islamic tradition and extremism that allow identifying the tone and ideological emphases of media discourse. The results of the study of media discourses in online space lead to the understanding of the influence and role of modern technologies and media formats on the construction of religious ideas in the society and emphasize the need for an ethically responsible approach to religious issues. It can also serve as a basis for the development of educational and informational programs aimed at strengthening interfaith dialogue, religious tolerance, increasing the level of information literacy of the population for a deeper understanding of socio-cultural processes in Kazakhstan.

Keywords: Religious media discourse, Cognitive linguistics, Kazakhstani online space.

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An Examination of the Türkiye Century Education Model in the Context of Mathematics Teachers'

FURKAN OZDEMIR*¹

Abstract: In contemporary times, education systems are undergoing continuous transformation in response to evolving societal needs and rapid technological advancements. Within this framework, the Education Model has emerged as a noteworthy and innovative educational approach. This model not only represents a significant component of the reforms undertaken within Turkey's education system but also offers a perspective that aligns with global educational trends and standards. The implementation of the Education Model has substantially redefined the role of teachers, transitioning them from traditional transmitters of knowledge to facilitators and mentors. This paradigm shift promotes the adoption of student-centered teaching methodologies, encouraging active student participation in the learning process. Moreover, given the growing integration of technology into education, the Education Model advocates for the incorporation of digital tools to enhance students' access to information. Particularly in recent years, there has been a notable increase in research focusing on the Education Model, driven by the broader transformation of educational policies in Turkey. Scholars in the field of education have examined various dimensions of the model, investigating its feasibility and impact. For instance, in his evaluations regarding the future of the Turkish education system, Gökhan Yılmaz (2020) highlights that the Education Model fosters the development of students' critical thinking skills and enhances their creative problem-solving abilities. As an innovative approach contributing to the transformation of Turkey's education system, the Education Model's success largely depends on how it is perceived and implemented by teachers. Despite its growing importance, there remains a paucity of research focusing specifically on teachers' perspectives regarding the model. Accordingly, the research question of this study is formulated as: "How do teachers evaluate the Education Model?" The study hypothesizes that teachers hold positive views concerning the effectiveness of the Education Model's implementation processes. The primary objective of this research is to explore teachers' perceptions, insights, and experiences regarding the Education Model. In line with this overarching aim, the study seeks to: (i) analyze the knowledge levels of mathematics teachers concerning the Education Model; (ii) evaluate teachers' views on the model's applicability; and (iii) provide policy recommendations based on the findings obtained. This study will adopt a qualitative research design. Data will be collected through semi-structured interviews and questionnaires. Semi-structured interviews aim to provide an in-depth understanding of teachers' experiences with the Education Model, while questionnaires will gather broader quantitative insights from a larger sample of teachers. The data will be analyzed through content analysis methods, considering teachers' opinions as the dependent variable and their professional experiences as the independent variable.

Keywords Türkiye, education system, math teachers

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Kurşunlu - Leaded Buildings from The Ottoman and Romanian Heritage

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Abstract: The paper refers to the practice, dating back many centuries, of installing lead sheets on the roof of buildings, for the purpose of protection against wind, rain, Sun, snow, but also as a lightning rod. The importance of installing lead sheets on the roof of buildings also lies in the fact that, in the Ottoman space, the Turkish word "kurşunlu" = "with lead" became a proper noun: "Kurşunlu", and in the Romanian space, the word "plumb" = "lead" became a proper noun: "Plumbuita". The originality of the paper lies in the identification and presentation of these proper names, derived from the idea of the use of lead, which are carried not only by churches and mosques, but also by parks, castles, cities, slums and even by a waterfall. The theme of the use of lead, in the form of sheets for the roof of buildings, offers an open window into the technical solutions and choices made by builders of past eras in the purpose to protect buildings from the action of natural and environmental factors. The study is also an invitation to contemplate the complex interaction between building materials, creativity and human ingenuity embodied in the art of technology and in the technique of the art of building craftsmen, on the one hand, and cultural practices and the way in which they were imprinted in the collective and identitarian memory and were reflected in the etymology of the names of many buildings, especially mosques and churches, but also other types of locations, names of places and even entire geographical spaces, on the other hand.

Keywords: Lead, covering, domes, buildings, workability, heritage, minaret, roof.

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From Substance to Simulation: The Psychological and Academic Impact of Digital Overexposure

LORENA ÇADRI *¹, IRIS NELA ²

Abstract: In metaphysical philosophy, the concept of *Hypokeimenon*, “that which lies beneath” or the fundamental substratum, refers to the essence that remains constant despite external changes. This paper reinterprets *Hypokeimenon* within the contemporary context of digitalization, viewing it as the core identity and well-being of the individual, which today faces distortion due to continuous interaction with technology. Screens, ranging from phones to computers and televisions, have become the primary medium for perceiving the world, learning, interacting, and building personal experience. Daily contact with university students reveals a clear trend: they spend a significant amount of time in front of digital sources. While this practice is often considered as a habit, it brings concerning consequences: reduced concentration, declining motivation, social withdrawal, and detachment from direct experiences with nature. In this sense, excessive use of digital technology challenges the human’s natural substratum, what *Hypokeimenon* symbolizes: the organic connection to the physical world, embodied sensory experience, and active engagement with reality. This study aims to analyze the impact of screen time versus time spent in nature on academic performance and psychological well-being in youth. It raises key questions: Is prolonged screen exposure contributing to decreased focus, motivation, and school achievement? Can exposure to nature help improve mental health and academic success? How can a sustainable balance be maintained between digital reality and natural experience?

The methodology combines a thorough literature review of international studies on the effects of technology on youth cognition, social behavior, and educational outcomes, with a quantitative study conducted among university students in Albania. The study measures time spent on screens versus time spent in nature and correlates these habits with academic performance and self-reported levels of stress and well-being. The findings are expected to help build a clearer framework for educators, parents, and educational policymakers, encouraging new models of intervention that bring youth back into direct, embodied experiences with the world, through nature and real social environments, a way of preserving their *Hypokeimenon*, their core identity and humanity in an increasingly digital age.

Keywords: Screen time, hypokeimenon, academic performance, digitalization,

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The Impact of ESG Factors on the Price-to-Book Value Ratio: Evidence from the Middle East

MIRJAM HAMAD

The study examines the impact of ESG factors on the price-to-book value (P/BV) ratio. Several researchers postulate that the difference between a company's market value and book value can be attributed to a type of intellectual intangible capital. Thus, considering that ESG indicators serve to demonstrate a company's non-financial performance, this study investigated whether there is a relationship between ESG factors and the price-to-book value (P/BV) ratio. The study examined data from 166 companies listed on Middle Eastern (7 countries) stock exchanges. The analysis was performed using linear regression. As a result of the research, it was determined that there is no significant effect between the Environmental pillar and the P/BV ratio, and similarly, no significant effect between the Social Pillar and the P/BV ratio. In contrast, there is a significant effect between the Governance Pillar and the P/BV ratio in the examined companies. The results show that higher governance scores are significantly associated with higher P/BV values.

Keywords: Lean, bank, back office, value creation, cost savings

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Methodology For Correctly Structuring An Active Lesson In The Methodology Of Teaching Fine Arts

EMİL AĞAYEV*¹

Abstract: As in the teaching of every subject, in fine arts, the teacher must plan the lesson for the students correctly. The first step in organizing an active lesson correctly is motivation or posing a problem. During motivation, the teacher should bring creative thinking and aesthetic response to the forefront in the fine arts subject. During research, the teacher can put forward hypotheses. In the fine arts subject, he can ask research questions about the creativity of various artists. During information exchange, students try to find answers by discussing the knowledge they have acquired in the fine arts subject with each other. Discussion of information is important in teaching creative subjects. At this time, the teacher must systematize all the information. In the subject of fine arts, research questions can be asked about the creativity of various artists. During the exchange of information, students discuss the knowledge they have acquired in the subject of fine arts with each other and try to find answers. The discussion of information is important in the teaching of the creative subject. At this time, the teacher must systematize all the information. In the teaching of the subject of fine arts, the existing research question can be supplemented with tables or creative ideas. The next stage of the active lesson is the conclusion and generalization, in which the student must independently summarize the new knowledge he has learned about the subject of fine arts. During creative application, the fine arts teacher can present a comparative analysis of the work of art or the creativity of artists to the students. Finally, the fine arts teacher should use assessment.

Keywords: Fine arts, active learning, methodology, creativity, education

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The de-evolution of Romanian Tobacco Industry. Historical Perspectives, Current Challenges

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Abstract: Producing cigarettes was a state monopoly in the Austro-Hungarian Monarchy and the Romanian Kingdom. Factories were established through state investment, and the distribution of products on the market took place through centralized management. During the last years of the Socialist system, the Romanian tobacco- and cigarette production system had 16 working points, of which six were factories with a production of a large scale of national brands, like the Snagov, Bucegi or Carpați, and even if Romanian brands were not comparable with Western brands like Pall Mall, Kent or Marlboro, but even so, had their place on export markets. Just like the rest of Romanian industry during the post-Socialist transition period, the tobacco-producing industry also met its hardships, from the loss of markets to shady privatization processes. Tobacco farming declined. From 1990 to 2013 land surface where tobacco is produced declined by 94% and indigenous annual tobacco production decreased with 90%. Currently, cigarette production in Romania is monopolized by three multinational companies, the production of historical brands ceased to exist. After the accession of Romania to the EU in 2007 Romania became a net tobacco product exporter. Raw material is imported and the industrial production is controlled by big multinationals. In our presentation, we will describe this process of decline.

Keywords: Tobacco industry, Romania, post-socialist transition, multinational corporations

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An experiment to learn about the innovation culture among secondary school students

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Abstract: In this study we aimed to investigate the innovation culture among secondary school students. We learnt about the definition framework of the innovation culture, as well as the results of the relevant surveys without presenting a full literature review. We used an online Google form for the collection of data from the students learning in secondary schools in Szekesfehervar, Hungary. The survey included thirty questions with 631 people responding during fifteen days. Our aim was to get to know their thoughts about innovation beyond the general questions. One of our further goals was to learn about their willingness of cooperation with their classmates and if they have a good idea about how to use it, furthermore whether they have attended an idea developing competition or not. We got answers from the study related to coping mechanism of the students with uncertainty, the thought of failure, the risks and how to avoid them, and whether they can commit to their aims or not. Our study was an experiment in the investigation of the innovation culture among the students learning in local secondary schools. Our presented results support the local decision-makers and the providers of the educational institutes in setting out further developing plans in this area. The study can draw the attention of the local higher education institutions to this topic, and they can realize their own role in the shaping of the secondary school students' innovational attitude and mindset as one of their third mission activities. With the development of the secondary school education's innovative culture, the town is presented with the opportunity to build a more innovative community through collaborations among the HEIs and secondary schools via raising the willingness of students to innovate.

Keywords: innovation culture, secondary school, students, university, innovation, collaboration, third mission

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Exploring the use of the RACE Prompt Engineering Framework to Enhance CONSORT-AI Compliance

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Abstract: Large Language Models (LLMs) have emerged as transformative tools in natural language processing, demonstrating the ability to generate coherent, context-aware responses across a wide array of applications. Their adoption is expanding in critical domains such as healthcare, education, finance, and customer service, where they are employed to automate communication, support decision-making, and enhance productivity. A pivotal aspect of effectively utilizing LLMs is *prompt engineering*, the process of crafting inputs to extract accurate, relevant, and context-specific outputs. Several prompt engineering frameworks have been developed to standardize this process and improve consistency and performance. This study explores the feasibility of applying the RACE prompt engineering framework within the context of the CONSORT-AI reporting guideline, which aims to enhance transparency and rigor in clinical trials involving artificial intelligence interventions. Using our previous evaluation of 28 articles on CONSORT-AI guideline as a baseline, this feasibility study examines the first five articles and their corresponding CONSORT-AI assessments. We develop and implement RACE-based prompts for the first 12 items of the CONSORT-AI checklist and evaluate model performance using key metrics, including precision, sensitivity, and F1-score. The findings aim to assess the potential integration of structured prompt engineering frameworks into AI-driven evaluation methodologies for clinical research reporting.

Keywords: Large Language Models, Prompt Engineering, CONSORT-AI

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The Financial Implications of Corporate Sustainability: An Empirical Analysis of ESG Risk and Performance in the Freight Industry

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Abstract: Nowadays, CSR (Corporate Social Responsibility) and ESG (Environmental, Social, Global) initiatives have become increasingly important in how companies operate. That is why we consider it important to examine the impact of ESG and its different components on the company's operations and on some of its indicators. This research aims to investigate the impact of corporate sustainability performance on corporate financial performance. For these, we used both accounting and market-based performance indicators. Accounting-based financial performance was assessed using both absolute indicators, such as revenue, and accounting-based measures, such as Return on Sales (ROS). We used as market-based performance the Tobin's Q ratio, under the assumption that higher Tobin's Q values may suggest that the market incorporates additional, non-financial considerations in its short-term valuation of firms. According to Mardini's (2022) research suggests that a firm with higher environmental and governance factors tends to increase its Tobin's Q in order to satisfy stakeholders' decision-making needs. The social factor has a negative and significant effect on CFP for market indicators and a negative but not significant effect on CFP for accounting indicators. In addition, we examined the effects of various risk indicators, such as DOL (Degree of operating leverage), DFL (Degree of financial leverage), VaR (Value-at-Risk), CVaR (Conditional Value-at-Risk), semivariance on firm performance. The analysis is based on a sample of 30 freight companies selected by their size, specifically by market capitalisation. Corporate sustainability performance was expressed by Sustainalytics ESG Risk Ratings and their dimensions.

The relationship between the above-mentioned indicators and financial performance was examined using correlation analyses and multivariate regression (OLS). The main hypothesis stated that the ESG risk score and its dimensions could be linked to corporate financial and risk indicators. The key findings of this research indicate that higher ESG risk levels are associated with weaker corporate performance, particularly in terms of profitability indicators, and greater exposure to risk-related vulnerabilities. This underscores that ESG risk should be understood not only as a social concern.

JEL Classification: G3, G32, G5, Q5, Q56

Keywords: ESG risk, corporate financial performance, sustainability.

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The Role of Money Supply in Exchange Rate Movements: Evidence from Romanian Data

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Abstract: This research investigates the relationship between exchange rates and money supply (M1) in Romania over the period from 2008 to 2023, a timeframe characterized by significant economic transformations and macroeconomic shifts resulting from regional integration and global financial dynamics. Utilizing monthly data sourced from the National Bank of Romania, the analysis applies a comprehensive set of econometric methodologies, notably the Elliott-Rothenberg-Stock unit root test, Johansen cointegration test, Granger causality test, and Vector Error Correction Models (VECM). These methods enable a robust examination of both short- and long-term dynamics between these critical macroeconomic indicators. Empirical findings provide evidence of a strong long-term cointegration relationship between the euro-to-leu exchange rate and the M1 money aggregate, demonstrating that a 1% change in the M1 money supply is associated with approximately a 0.216% adjustment in the exchange rate. The Granger causality test further enriches the analysis by identifying a bidirectional causality in the short term; however, the predominant long-term causality direction flows distinctly from money supply to exchange rate movements. This indicates that monetary policies significantly influence exchange rate stability and variations. The research contributes notably to monetary economics by validating the theoretical expectations concerning the role of monetary aggregates in exchange rate determination in Romania. The findings hold considerable implications for policymakers, offering actionable insights for shaping monetary and exchange rate policies, especially within the economic context of Central and Eastern European countries.

Keywords: exchange rates, money supply, cointegration, Romania.

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Empirical methods in estimating the contribution of urban trees to ecosystem services

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Abstract: This research investigates the comparison of different methods of valuating the ecosystem services of urban trees. Urban forestry plays a critical role in delivering a diverse array of ecosystem services in cities. In urban environment ecosystem services cover for example air pollution mitigation, temperature regulation, carbon sequestration, stormwater management, and support for biodiversity and human well-being. Accurately quantifying these services is essential for informed urban planning, management and green infrastructure development. Tree inventories serve as foundational datasets for evaluating urban green assets, particularly in municipalities where they are considered public property. Despite their importance, there is currently no universally accepted methodology for valuing these services, with approaches varying significantly across countries. However, the European Arboricultural Standards have advanced efforts toward methodological harmonization, suggesting the potential for more standardized approaches in the near future. In our paper we introduce empirical methods like carbon storage and sequestration calculations, alongside measurements of Leaf Area Index (LAI) which are the most commonly accepted indicators for ecosystem service valuation. Remote sensing technologies offer new opportunities for enhancing data collection efficiency, accuracy, and frequency by decreasing the costs of on site measurements. It also provides the possibility of the dynamic monitoring of urban forests. Empirical methods—grounded in field-based measurements, environmental monitoring, and modeling—remain central to capturing the multifaceted contributions of urban trees. These methods not only allow us site-specific assessments but also support broader policy decisions related to sustainability, climate adaptation, and public health. Our findings may help cities, decision makers to chose from the different methodologies in the time when cities face increasing environmental pressures. Empirical approaches to ecosystem service estimation could be vital for optimizing the role of urban vegetation in urban resilience and sustainability planning.

Keywords: urban forestry, ecosystem services, tree inventory

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Current Issues of Business Ethics in a Central European Country, Hungary

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Abstract: Business ethics is the application of ethical values, principles and standards to business behaviour. Ethics goes beyond the legal requirements placed on companies compliance with the law is the minimum for business ethics so ethical business is about the voluntary choice and value-driven behaviour of ethical companies. Companies and organisations have a specific culture, which includes ethical values and standards. Corporate social responsibility expresses the commitment of an organisation to its stakeholders to increase the positive impacts of its activities and reduce the negative impacts. The rapid growth of modern literature makes it almost impossible to keep up with new research findings. There are often too many studies available through online searches, and it is difficult to review and organise them. Therefore, in our study, we applied a systematic literature review, which is a well-designed review designed to answer specific research questions, using a systematic and explicit methodology to identify, select and critically evaluate the results of the studies included in the literature review. The main focus of our analysis is on publications on business ethics in Hungarian organisations. We have found that there is a strong relationship between the terms business ethics, corporate social responsibility and sustainability in Hungarian organisations. What is new is that AI has appeared among the related topics, which is still surrounded by concerns and worries. The link between AI and business ethics should raise the responsibility of companies for the solutions they create, which includes issues related to privacy, data management, misinformation and manipulation of user behaviour, as well as the environmental impact of AI.

Keywords: Business ethics, Hungary, systematic literature review, corporate sustainability

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Sustainability Development Goals in the hospitality and tourism industry: a thematic content analysis

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Abstract: The aim was to make a thematic analysis of studies on Sustainability Development Goals (SDGs) in the tourism and hospitality sector. Sustainable Development Goals can be associated with tourism for each sub-goal and are seriously related to the whole. Although previous researchers have investigated the relationship between SDGs and tourism and the effects of tourism on SDGs, there is no systematic research on SDGs and tourism and their relationships. In this study, especially the existing publications conducted between 2015-2025 were evaluated. For thematic analysis, bibliometric analysis was first conducted and this was performed using VOSviewer software and Web of Science (WoS) database. SDGs were published in 2015 and therefore the studies were started after 2015. A total of 1008 articles were determined on SDGs, tourism and hospitality. China ranked first with 189 publications, followed by the USA with 122 publications. It was concluded that 580 of the SDGs and tourism studies were related to SDG 11 Sustainable Cities and Communities, while 222 were related to Climate Action (SDG 13). The research areas reflecting the important research direction in SDGs and tourism common field are Environment Science Ecology, Science Technology Other Topics, Business Economics and Engineering. The study also highlights three research centers and three future research directions. This bibliometric analysis provides a new guide for SDGs, tourism and hospitality sector research.

Keywords: SDGs, Sustainable Development Goals, tourism, hospitality

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Artificial Intelligence-Powered Personalized Insurance Experience: A New Era in Service Marketing

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Abstract: This study explores the impact of artificial intelligence (AI) driven personalization practices on customer experience in the insurance sector from the perspective of service marketing. Traditionally, the insurance industry has operated with limited customer interaction, relying on long-term, trust-based relationships. However, with the rapid rise of digitalization and data-driven technologies, customer expectations have evolved toward faster, more personalized, and proactive services. AI technologies through capabilities such as big data analytics, machine learning, and natural language processing enable insurers to anticipate customer needs, conduct behavioral segmentation, and optimize real-time interactions. This study employs a case study approach, analyzing innovative insurance applications from the United States, the United Kingdom, and Turkey. Findings suggest that AI plays a significant role in improving customer satisfaction, service quality, and loyalty. Nevertheless, structural and ethical challenges such as data privacy, algorithmic bias, transparency, and digital accessibility inequalities remain critical to the sustainability of this transformation. By examining both conceptual and practical dimensions, this study contributes to the academic literature on service marketing. It offers valuable insights for future research on AI applications in customer-centric industries like insurance.

Keywords: Artificial intelligence, personalization, service marketing, insurance sector, digital transformation, customer experience

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Epidemiology and Health Education in Patients with Hiv/Aids in Albania

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Abstract: Since its onset on June 5, 1981, the HIV/AIDS pandemic has affected approximately 38 million individuals, with 32.7 million recorded deaths. Over the years, extensive research, scientific breakthroughs, and medical advancements have significantly improved treatment options. Today, many individuals living with HIV can lead long and active lives. This study examines the dynamics of HIV/AIDS transmission in Albania, focusing on factors such as age, gender, and geographic distribution. Additionally, it aims to provide insights into transmission modes, at-risk populations, nursing care, and HIV/AIDS prevention strategies. **Materials and Methods:** The study utilizes data published by surveillance reports from the Institute of Public Health (ISHP), the World Health Organization (WHO), and the Centers for Disease Control and Prevention (CDC). This epidemiological analysis covers data from the years 2013, 2015, and 2017. Since the first reported HIV case in Albania in 1993, a total of 671 cases had been registered by November 2013. According to the 2011 Census, the national prevalence rate was 0.02%, and the incidence rate was 0.003%. In 2013, 96 new cases were diagnosed, 53 of which were at the AIDS stage. By 2015, the HIV prevalence rate had increased to 0.03%, while the incidence rate remained at 0.003% (INSTAT 2014). By 2017, the total number of registered cases had risen to 1,104, though prevalence and incidence rates remained unchanged. Heterosexual transmission accounts for the majority of cases (84%), followed by homosexual transmission (9%). Among people who inject drugs (PWID), 43.5% of cases are linked to HIV transmission. The most affected age group is 35-44 years (30.8%), followed by individuals aged 25-34 (28.3%). Men are the most affected demographic, comprising 469 of 671 cases in 2013 and 792 of 1,104 cases in 2017. Since 2013, Albania has established 14 voluntary HIV testing centers. While HIV/AIDS has not reached epidemic levels in Albania, persistent stigma leads to underreporting and delays in seeking treatment. Public health education is crucial in reducing the spread of HIV/AIDS, combating stigma, and encouraging early diagnosis and treatment to improve health outcomes.

Keywords: HIV/AIDS, prevalence, WHO, Institute of Public Health, Albania.

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From Tradition to Innovation: The Pioneers of Mountain Entrepreneurship in the Lesser Caucasus

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Abstract: In recent years, Georgia has witnessed a shift in its general policy orientation from agricultural to rural development, resulting in a transformation of household-based economic activities. Mountain areas have emerged as key focal points for promoting innovative approaches and practices for various reasons, such as lacking access to markets, outmigration, climate change, and generally difficult contexts for small-scale entrepreneurship. Many households in remote areas have limited access to the necessary resources, making it difficult to take advantage of new opportunities and benefits. This research focuses on pioneer entrepreneurial households in Khulo municipality in the Lesser Caucasus. The study's qualitative methodological approach allows a thorough examination of the topic, based on in-depth interviews in 2022 and 2023. We examine adaptation processes and the different forms of capital necessary to start a new business in the mountain environment, as well as motivations for starting a new business and challenges to maintaining economic activities.

Keywords:

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Economic Impacts of the Digital Divide: Access to Technology and Digital Skills Inequality

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Abstract: The Digital Skills Indicator is a comprehensive measure that evaluates individuals' competencies in the digital environment. It is based on specific activities related to the use of the Internet and software carried out in five main areas: information and data literacy, communication and collaboration, digital content production, security and problem solving. This indicator reveals individuals' digital competence by analyzing their level of effective, conscious and safe use of digital technologies. More than 90% of working life in European countries requires basic digital knowledge alongside traditional skills such as literacy and numeracy. However, approximately 32% of European countries lack basic digital skills (European data, 2023). The aim of this study is to examine the impact of the digital divide on inequality, analyze how lack of access to technology and digital literacy restricts economic opportunities, and offer solutions. In this context, Eurostat indicators of individuals' digital skill levels were examined. The research reveals that the digital divide significantly affects individuals' access to economic opportunities. A lack of digital skills reduces individuals' competitiveness in the labor market, making them less likely to be employed. The fact that the proportion of individuals in European countries who do not have basic digital skills is 32% shows that digital inequality is a widespread problem. It is also understood that the digital divide is not limited to access to technology alone, but that individuals' digital literacy levels are also a determining factor in economic opportunities. The digital divide is a critical factor that deepens economic inequalities and puts individuals at a disadvantage in the labor market. A lack of digital skills slows down economic development by negatively impacting individuals' chances of finding employment and earning income. In this context, expanding educational programs aimed at developing digital skills and increasing access to technology will play an important role in reducing the digital divide. Projects to be carried out in collaboration with the public and private sectors will strengthen individuals' access to economic opportunities by increasing their digital competencies.

Keywords: Digital Divide, Digital Skills Inequality, Economic Opportunities

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A Theoretical Research on Quiet Hiring

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Abstract: Silent hiring, in contrast to silent dismissal, is an employer tendency that arises from the idea that organizations should emphasise caring for their employees. According to the approach, it is an employment policy in which organizations try to regain their qualified employees by supporting and empowering them and rebuilding their mentally severed ties with their organizations. It focusses on recruitment to be done quietly, without reflecting on the outside. In other words, the aim is to solve the need for labour force without losing the existing employees in the organizations. With this perspective, organizations should discover unique talents among their employees and support them. In this direction, performance appraisal, promotion, training and motivation practices should be developed. It is an approach born in opposition to today's labour fluctuations. With this approach, it will be possible to improve the work-life balance of the employees, eliminate burnout and focus on corporate goals. In order for the approach to benefit the organization, motivating elements should be included in the process and support should be given to employees so that they do not feel cheated. In the light of these issues, employees should be given tasks appropriate to their abilities and they should be constantly motivated in line with their abilities. Through this approach, organizations can become talent scouts and at the same time avoid the costs and risks that outsourcing will bring to the organization.

Keywords: Organizations, recruitment, quiet hiring, worker

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Current Variables Researched in Postgraduate Theses in the Field of Organisational Behaviour

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Abstract: Organisational behaviour is one of today's human-oriented fields of study. especially academic studies have focused on human behaviour and have tended to be a guide for practitioners. Within the scope of the research, it has been tried to compile the current variables in the organisational behaviour literature in the last five years in Turkey. In this context, studies investigating new variables instead of variables that can be described as 'classical' such as motivation, burnout or job satisfaction were examined. The data were obtained from the web page of the Council of Higher Education (YÖK) thesis centre. The data obtained were analysed with the help of content analysis method. The current variables in postgraduate theses conducted in the field of organisational behaviour between 2020-2024 in Turkey were found in 18 different studies. These can be listed as meritocracy, behavioural biases, emotional capital, symbolic violence, personal branding, work effort, organisational loneliness, workplace friendship, organisational deviation behaviour, workplace ergonomics, meaning of work, professional vitality, psychological safety, self-leadership, organisational attractiveness, organisational myopia, organisational learning climate and reverse mentoring. It was seen that these variables were addressed in studies between 2-20 in the YÖK database. Accordingly, although there are still many variables that can be described as 'classical', it is noticeable that a limited number of new variables have started to be examined. In this respect, researchers' orientation towards current variables may be promising in terms of enriching the literature.

Keywords: Organisational behaviour, postgraduate theses, current variables

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Cashless Trends in Türkiye During the Digital Transformation Process

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Abstract: In the digital transformation process, it is necessary to evaluate the cashless trends in Turkey and the social and economic effects of this process. By examining the experiences of countries that stand out in cashless transactions around the world, implications for Turkey were made. The adoption of digital payment systems, individual spending habits and saving methods are evaluated. The opportunities and challenges faced by Türkiye in the cashless process are evaluated.

Keywords: Digital Transformation, Digital Payment Systems, Cashless Society, Digital Transformation, Politics, Türkiye

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Tensions in Emergency Response Systems: A CHAT-Based Study at AKOM

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Abstract: During disasters, teams *knot-work* for timely emergency response, however, breakdowns and ruptures in the emergency response activity systems avoid effective response. The objective of this research is exploring the breakdowns and ruptures hindering effective coordination in the emergency response activity systems. By doing so, emergency response organisations may re-design their system for effective response activities, and decrease the losses. Qualitative methodology was used in this research. Interviews, field observations and content analysis were done in AKOM settings. Through the lens of CHAT's transformation and development principle, the researcher scrutinises the tensions and contradictions in the emergency response activities. Interview transcripts and field observation notes were analysed via NVIVO 8 program. Relationships established between themes, nodes and codes. Findings reveal that tensions and contradictions arouse between the nodes of the activity systems and the interacting emergency response activity systems. Lack of capability and adequate training to use the information and communications tools, confusing goals, tensions between emergency response teams (Ambulance, Fire Brigade, Police, AKOM C&C), conflicting rules and regulations stand out. Research findings shed light onto the breakdowns and fallacies in the emergency response activity system. Through the analysis of the research findings, transformation inside the AKOM should be held: evaluation of the hierarchical structure which overlaps with the effective and timely emergency response, re-designing information and communication tools which facilitate intra- and inter-organisational networking and sharing, and amendment of the rules and regulation which allows AKOM to coordinate emergency response teams at the incident site in a significant way.

Keywords: AKOM, Cultural Historical Activity Theory, emergency response, activity systems' breakdowns

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The Effect of Environmental Factors on the Design of Heat Exchangers Used in Aircraft

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Abstract: This study investigates the performance optimization of an air-to-air two-pass cross-flow heat exchanger using bleed air data extracted from the engine for use in an aircraft's Environmental Control System (ECS). The performance and efficiency of the heat exchanger were analyzed by considering different flight cases (ground operation, climb) using ECS data. These data, including mass flow rate (kg/s), temperature (K), and absolute pressure (bar), were integrated into a CFD analysis to simulate the performance at different altitudes and evaluate the system's behavior under defined conditions. Additionally, heat exchanger sizing calculations were performed to estimate the required dimensions for optimal heat transfer and system performance. The following data were used in the study: Ground and cruise conditions were modeled using temperature and pressure conditions specific to each case. Mass Flow Rate (kg/s): Various values such as 0,208 and 0,322 kg/s were considered to simulate bleed air flow under different altitude conditions. Temperature (K): Values ranging from 540,75 K to 702,2 K and 373,75 K to 298.86 K were used to simulate environmental conditions during cruise flight at 30000ft altitude. Pressure (bar): Absolute pressures ranging from 3.2 bar to 1 bar were considered to assess the performance of the ECS at higher altitudes. The heat exchanger's efficiency was evaluated through temperature distribution, heat transfer, and pressure drop analyses. In addition to CFD analysis, sizing calculations were performed using standard heat exchanger design equations to determine the required dimensions, surface area, and configuration for efficient heat transfer between the bleed air and the environmental control system. The CFD simulation results, combined with the manual calculations, provide insights into the necessary design improvements and operational parameters to optimize the heat exchanger's performance at different flight phases (ground and climb). In conclusion, the analysis of different flight phases (ground and climb) reveals the need for design optimizations and operational parameter adjustments to ensure the heat exchanger functions efficiently. This study aims to contribute to the enhancement of heat exchanger technologies used in aircraft environmental control systems, improving overall performance and efficiency.

Keywords: Environmental control system, bleed air, climb, ground position, air-to-air heat exchanger, CFD, performance analysis, efficiency optimization

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Psychological Distress Among Female University Dormitory Residents: A Descriptive Study at Setif University 1

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Abstract: This study investigates the prevalence and dimensions of psychological distress, specifically anxiety, depression, and social isolation among female students residing at El Baz University Dormitory, Setif University 1. Employing a descriptive research design, the study surveyed a purposive sample of 200 resident students, including 180 local and 20 international participants.

A psychological distress scale was specifically constructed and adapted by the researcher to align with the study's specific context and objectives. The instrument underwent rigorous psychometric evaluation and demonstrated satisfactory levels of validity and reliability indicators.

Results revealed that psychological distress is present among the target population, with varying intensity and degrees of severity across its three dimensions. Notably, no statistically significant differences in distress levels were observed based on participants' age or nationality.

Keywords: Psychological Distress, Female University Students, Dormitory Life, Setif University 1

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Regional Minimum Wage? Urban-Rural Minimum Wage? The Applicability of the Urban-Rural Minimum Wage in Turkey According to the NUTS

Fulya ÇINAR*¹

Abstract: The purpose of this study is to examine the regional minimum wage system that was in effect in Turkey between 1967 and 1974, and to investigate the applicability of a rural–urban minimum wage system—one that has not previously been implemented in Turkey—within the framework of the Nomenclature of Statistical Regional Units (NUTS). Methodologically, the study first reviews the repealed Labor Law No. 931, the lawsuits filed against its implementation, and the annulment decisions of the Council of State and the Constitutional Court regarding the regional minimum wage. Subsequently, economic indicators such as the cost of living (e.g., housing, transportation, food) and informality rates in urban and rural areas were analyzed based on NUTS levels obtained from TurkStat and literature research, with particular attention also given to rural–urban migration. Findings indicate that the costs of basic needs such as housing and nutrition are higher in urban areas compared to rural areas, while the overall cost of living is lower in rural regions. The evaluation concludes that a classification solely on the basis of NUTS would not be sufficient in determining the minimum wage; professional chambers and organizations at the provincial and district level should also play an active role in the process. Considering the previous annulment of the regional minimum wage system on the grounds that it violated the constitutional principle of equality, this study argues that a minimum wage determined with reference to the urban–rural divide, and grounded in cost of living and sustainability criteria, could promote equal opportunity. Furthermore, it is concluded that such an approach could reduce the social costs of rural–urban migration—such as ghettoization and security problems—and thereby help to alleviate the issue of rural–urban migration.

Keywords: Rural-Urban Minimum Wage, Regional Minimum Wage, NUTS

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Islamic Finance and Sustainability: Current Practices and Trends from Turkey

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Abstract: This study aims to evaluate the approach of Islamic financial institutions in Türkiye to sustainability. The Islamic financial system, especially shaped by participation banking, has been examined in the context of environmental, social and governance (ESG) criteria, and a link has been established between the conceptual framework and current practices. In the study, the harmony between the principles of interest-free finance and sustainability targets has been revealed, and institutional practices in Türkiye have been analyzed comparatively with countries such as Malaysia and Indonesia. The findings show that practices in Türkiye are developing but have not yet reached a systematic and holistic sustainability approach. The study aims to strengthen the vision of sustainable Islamic finance by offering recommendations for policy makers and sector representatives.

Keywords: Finance, Islamic Finance, Sustainability, Participation Banking

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Learning Support Robots in the World of Artificial Intelligence

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Abstract: From time to time, the results of the PISA surveys have shocked and puzzled education professionals and ordinary people alike. Hungary has not been able to show spectacular and improving results in many of the competences tested. In most cases, the poor results are explained by the poor abilities and knowledge of disadvantaged students, most of whom are gypsies, living in difficult circumstances. The evidence shows that these students need different teaching and learning methods to achieve better results. In several disadvantaged municipalities, we are trying to provide remedial and developmental sessions using different educational robots to develop the necessary competences. In addition to robots, artificial intelligence and its services also play an important role in training. The aim of the sessions is to develop children's basic competences, improve their learning outcomes and develop and consolidate their digital literacy skills, which will keep them in step with their peers. To test whether the sessions and the tools used in the sessions really contribute to the development of students' competences, we created online playful questionnaires to assess students' knowledge and progress. In order to better understand the results, in-depth interviews were conducted with the primary school teachers who taught the children. From the study, we can learn about the robotics activities and get acquainted with the tools and robots used. We can see the impact of artificial intelligence on children's own learning, and find out what teachers think about the learning support and stimulating effects of robots and AI for disadvantaged children.

Keywords: educational robots, competence development, disadvantage, artificial intelligence

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1. INTRODUCTION

The rapid technological development and changes of the 21st century have a significant impact on our everyday lives, our communication, our shopping and entertainment habits. At the same time, the nature of the workplace has changed in recent decades. People with higher skills have an advantage in the labour market. Jobs that can be done with lower skills are increasingly being taken over by technology, mechanisation and robotics (Molnár, Turcsányi-Szabó and Kárpáti, 2019). The evolution of technology is also affecting the learning landscape, from kindergarten to higher education (Molnár, 2021).

Information and communication technologies are “a set of tools, technologies, organisational activities and innovative processes that facilitate, speed up, facilitate and make more efficient the transmission, processing, flow, storage and encoding of information and communication” (Molnár, 2018). Technology-enhanced educational processes, including educational robotics, have the potential to change the processes of learning and teaching. The use of educational robots is a novel and interesting response to the questions posed by the 21st century and the information society (Majzik, 2020). These tools include educational robots, also known as floor robots, because they move on floors or desks. From a traditional classification point of view, floor robots can clearly be considered as educational devices, since they are essentially involved in the teaching process. In addition to the motivational effect, students are also introduced to the basic features of robotic devices. The Bee-Bot/Blue-Bot, Codey Rocky, Edison and Ozobot robots are basically designed for young school children to experience the different robotics features. In several municipalities, these floor robots are used in parallel to educate disadvantaged students (Fehér, Aknai 2020). After school, they participate in weekly robotics sessions, where we aim to reinforce the school curriculum, acquire additional knowledge and develop digital competences.

In Hungary, the social, economic and political changes that have taken place since the regime change have significantly transformed the structure of society, and the impact of increased social inequalities can be felt in all areas of education (K.Nagy 2019). The socio-economic benefits that can be realised through education are most beneficial for children from disadvantaged social groups. If students from disadvantaged family backgrounds do not have the skills to enter the labour market when they leave the education system, they are unable to contribute to the public purse, or only to a limited extent, while generating costs for society, including unemployment, social and health care, and also the costs of the prison system (Fejes et al. 2020). A significant proportion of Roma pupils have unsuccessful school careers. To explain the reasons for their failures, it would seem obvious to refer to cultural differences and the failure of schools to take them into account (Fejes 2005).

Playful teaching and development is a key aspect in the development of children with SNI. By introducing children to a robotic tool, we can activate an intrinsic motivational base that is difficult to mobilise with traditional tools. We can easily motivate children with any kind of disability with a nice, perhaps talking, floor robot. With the help of robots, children can learn the basics of robotics and coding through play, by doing different tasks. They actively learn different subject content through hands-on activities with the robots, and develop different skills through developmental tasks with the robots. The robots help children develop their attention, memory and thinking functions through play. Emotion-based child-robot interaction helps to focus attention, improve information perception during learning and verbalisation. It is a process that has a good impact on children's educational rehabilitation and also develops their emotional culture when interacting with robots (Aknai, 2020).

Teachers also noted that the use of social skills during technology sessions differed from other lessons. Difficult concepts became familiar and students began to actively use them during the project. The students were characterized by motivation, enthusiasm and active participation while performing the tasks (Kärnä-Lin et al., 2006). But despite the scientific results so far, there is still scepticism among teachers about the use of robots in the education of SNI students. There is a rather limited national literature on the introduction of robotics in education (Fehér & Aknai, 2019, 2020). Our intention is to test whether the robotics activities we deliver are effective, whether they really help children to learn at school and whether they are demonstrably useful. Furthermore, they have been shown to help teachers to develop language, mathematics, digital and linguistic competences.

2. MATERIAL AND METHOD

In order to find out whether the robotics sessions had a demonstrable impact, whether the students acquired useful knowledge, whether the knowledge acquired contributed to the development of any of their competences, I completed an online quiz (questionnaire) with the students on 2 occasions during the school year. The quiz was completed by a total of 55 students in 3 locations. The results were evaluated using a simple statistical method. In-depth interviews with the teachers who taught the students helped to gain a deeper understanding of the findings.

3. RESULTS

We asked the question: do you like robotics? Remember that the purpose of playful sessions is learning, and they are always held in the afternoon after school, when most students are tired. Out of the 55 students who responded, only 5 said they did not like it, while thirty-six students answered yes to the question, so 90% of students like robotics. In response to the question "Have you learnt anything that you have not learnt before at school? Without exception, all students answered yes, so in all cases the robotics sessions showed and taught the participating students something new. We were curious to know if there was any knowledge that they had not understood or had not managed to master before at school, but during the robotics sessions they had successfully mastered and understood it. For example, we learned about the analogue clock, which we simulate with a microbit and we learned about the clock and its hands by assigning angles to them. We became aware of this shortcoming of the students when they regularly asked us what time it was because they had to catch the bus. After asking the question, we pointed to the wall where, with a wall clock clearly visible, the children repeatedly asked what time it was, which made us realise that they were not really familiar with the analogue clock. So, when asked if they had understood something during the sessions that they hadn't understood before at school, thirty-two children said yes, they had.

In addition to the general questions, we wanted to find out whether the children understood what they had learned in the session and how it related to their everyday knowledge at school, using the programs and programming languages they had learned. For example, fractions, angles and the coordinate system. The figure below shows one such question.

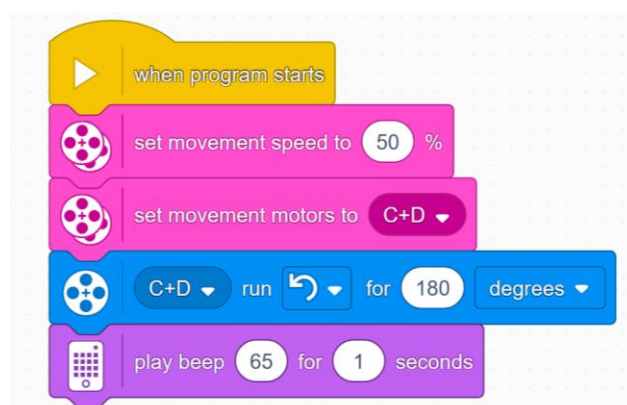


Figure 1. The question was: Which block rotates the Lego robot?
Source: own edit

It can be seen that a basic knowledge of block programming is needed to understand the task, and that they also need to be familiar with percentage and angle rotation. Forty-seven of the students answered the question correctly. A similar task is shown in the following figure, where the task asks children to recognise fractions and know which is the smallest. By understanding the blocks and knowing the fractions, they were able to correctly answer which sound could be heard for the shortest time on the microbit.

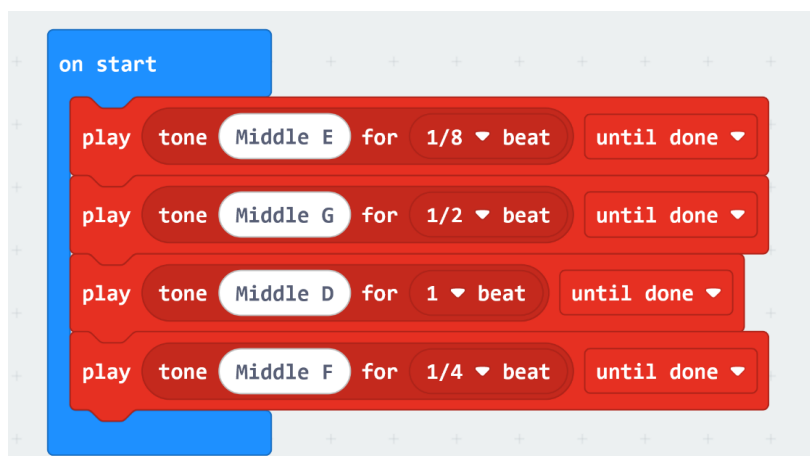


Figure 2. Another question in the online quiz is, Which sound do you hear the least on the microbite?
Source: own edit

Thirty-six of the 55 children questioned answered correctly that the 'E' sound lasts the longest. Similar playful questions were used to get a relevant picture of whether the students had mastered all or part of what they had learned during the sessions, whether they understood it and could apply it correctly?

It may be a legitimate question to ask whether this knowledge was really acquired during the sessions or whether it was already known beforehand. In this case, based on what their teachers have told them, who have stated that the children are almost invariably poor learners with learning difficulties, and that their knowledge is therefore very incomplete. The majority of the students did not have these basic competences. There are no robotics classes at school, no robotics or programming in IT lessons, so the knowledge of programming languages, the commands learnt there and the correct linking with school knowledge are all due to robotics classes. In several cases, teachers reported that students reported having acquired knowledge that they had not previously learned at school and explained that they had learned it in robotics lessons.

4. DISCUSSION AND CONCLUSIONS

Based on children's reports, test results and in-depth interviews with the teachers who teach them, it is clear that robotics sessions are useful. In addition to the fun and interesting activities that students participate in, the robots and various IT tools help to motivate these disadvantaged students. It brings a new perspective to the concept of learning. They do not take part in the usual school setting, in the frontal classical classroom, in lessons, but they learn by playing and develop their competences. In addition to the development of IT competences, the development of mathematics and foreign language competences is clearly noticeable, thanks to the fact that several block programming languages are only available in English. The results of the reports clearly show that it is worthwhile to hold these robotics sessions and to continue to motivate and teach children through play, taking advantage of the opportunities offered by these tools. They can be of help to pupils with learning difficulties, since they can learn and master the knowledge they have not acquired at school. Instead of constant failure, they experience success, which leads them to a love of learning. The robotics and IT sessions are a guideline to encourage further learning.

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Artificial Intelligence-Based Intervention Models and the Future of Social Work: A Sociological Assessment

İREM KOCAKAPLAN

Abstract: This article comprehensively examines the role of artificial intelligence (AI) technologies in the field of social services, the opportunities they offer, and the risks they pose. The study focuses on AI's data processing capacity, risk assessment processes, predictive modeling, and ability to draw meaningful conclusions from large-scale data sets. It is noted that AI-based applications can make significant contributions to providing fast, effective, and more accurate interventions, particularly in areas such as child protection, elderly care, mental health, and poverty alleviation. Additionally, the article highlights risks such as algorithmic bias, data security issues, ethical violations, and the marginalization of the human factor, which may conflict with the fundamental principles of social services. The article argues that the use of AI in social services is determined not only by technical capabilities but also by social context, cultural values, and policy preferences, evaluating technological determinism and social constructionist approaches together. In this context, interdisciplinary collaboration, continuous updating of ethical standards, strengthening of legal regulations, and increasing the technological literacy of social service professionals are recommended for the effective and equitable use of technology in social services. In conclusion, the study reveals that AI in the field of social services not only increases the efficiency of service delivery but also contributes to the strengthening of social justice when properly designed and applied within an ethical framework.

Keywords: Artificial intelligence, Social services, Technological determinism, Ethical issues, Social policy.

Yapay Zekâ Tabanlı Müdahale Modelleri ve Sosyal Hizmetin Geleceği: Sosyolojik Bir Değerlendirme

Özet: Bu makale, yapay zekâ (YZ) teknolojilerinin sosyal hizmet alanındaki rolünü, sunduğu fırsatları ve beraberinde getirdiği riskleri kapsamlı bir biçimde incelemektedir. Çalışmada, YZ'nin veri işleme kapasitesi, risk değerlendirme süreçleri, öngörü modelleri oluşturma ve büyük ölçekli veri setlerinden anlamlı çıkarımlar yapma becerileri üzerinde durulmaktadır. Özellikle çocuk koruma, yaşlı bakımı, ruh sağlığı ve yoksullukla mücadele gibi alanlarda YZ tabanlı uygulamaların hızlı, etkin ve daha isabetli müdahaleler sağlamada önemli katkılar sunabileceği belirtilmektedir. Bunun yanında, makale algoritmik önyargılar, veri güvenliği sorunları, etik ihlaller ve insan faktörünün geri plana itilmesi gibi risklerin sosyal hizmetin temel ilkeleriyle çelişebileceğine dikkat çekmektedir. Makale, teknolojik determinizm ile toplumsal inşacılık yaklaşımlarını bir arada değerlendirerek YZ'nin sosyal hizmetteki kullanımının yalnızca teknik imkânlarla değil, aynı zamanda toplumsal bağlam, kültürel değerler ve politika tercihleriyle belirlendiğini savunmaktadır. Bu çerçevede, teknolojinin sosyal hizmette etkin ve adil biçimde kullanılabilmesi için disiplinler arası iş birliği, etik standartların sürekli güncellenmesi, yasal düzenlemelerin güçlendirilmesi ve sosyal hizmet uzmanlarının teknoloji okuryazarlığının artırılması önerilmektedir. Sonuç olarak çalışma, YZ'nin sosyal hizmet alanında yalnızca hizmet sunumunun verimliliğini artırmakla kalmayıp, doğru tasarlandığında ve etik çerçevede uygulandığında toplumsal adaletin güçlendirilmesine de katkı sağlayabileceğini ortaya koymaktadır.

Anahtar Kelimeler: Yapay zekâ, Sosyal hizmet, Teknolojik determinizm, Etik sorunlar, Sosyal politika.

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GİRİŞ:

Sosyal hizmet, Uluslararası Sosyal Hizmet Uzmanları Federasyonu'nun (IFSW) tanımına göre; sosyal değişimi, sosyal uyumu ve bireylerin güçlendirilmesini teşvik eden, insan hakları ve sosyal adalet ilkelerine dayalı uygulamalı bir meslek ve akademik disiplindir (IFSW, 2014). Bu tanım, sosyal hizmetin yalnızca bireysel refahı değil, aynı zamanda toplumsal yapının güçlendirilmesini de hedeflediğini ortaya koymaktadır. Sosyal hizmet uzmanları, mikro düzeyde birey ve ailelerle, mezo düzeyde topluluklarla ve makro düzeyde toplumsal politikalarla çalışarak çok katmanlı bir müdahale alanı yaratırlar (Zastrow, 2014, s. 532). Yapay zekâ (YZ) ise, insan zekâsına özgü işlevleri yerine getirebilen sistemler olarak tanımlanır. Bu sistemler, öğrenme, akıl yürütme, problem çözme, algılama ve doğal dil işleme gibi bilişsel süreçleri taklit edebilir (Surden, 2019, s. 1307). Gelişen algoritmalar ve artan işlem gücü sayesinde YZ, artık yalnızca veri işleme değil, aynı zamanda karar verme, öngörü ve karmaşık analiz süreçlerinde de etkin biçimde kullanılmaktadır (Çatal, 2025, s. 313). YZ'nin sağlık, eğitim, bankacılık ve hukuk gibi alanlarda kullanımına ilişkin başarı hikâyeleri, bu teknolojinin

sosyal hizmet alanında da potansiyelini gündeme getirmiştir. Nitekim, sosyal hizmet uygulamalarında karar destek sistemleri, risk değerlendirme araçları, danışmanlık chat-bot'ları ve büyük veri tabanlı politika analizleri giderek daha fazla gündeme gelmektedir (Wang, 2025, s. 265). Sosyal hizmetin insan odaklı yapısı ile YZ'nin veri odaklı yapısının kesişimi, hem fırsatlar hem de riskler barındırmaktadır.

1. YAPAY ZEKA TABANLI SOSYAL HİZMET UYGULAMALARI:

Sosyal hizmet mesleğinin temel amacı, dezavantajlı grupların yaşam kalitesini artırmak, eşitsizlikleri azaltmak ve toplumsal refahı güçlendirmektir. Ancak modern toplumlarda sorunların çeşitlenmesi ve karmaşıklığının artması, sosyal hizmet uzmanlarının üzerindeki iş yükünü ciddi biçimde artırmıştır. Tıpkı hukuk sisteminde hâkimlerin artan dava yükü karşısında YZ'den destek almasının tartışıldığı gibi (Çatal, 2025, s. 314), sosyal hizmette de yüksek vaka yoğunluğu ve kaynak yetersizliği, teknolojik destek ihtiyacını doğurmaktadır. Bu noktada YZ tabanlı müdahale modelleri, özellikle risk değerlendirmesi, erken uyarı sistemleri, hizmet planlaması ve müdahale stratejilerinin belirlenmesi gibi alanlarda önemli katkılar sunabilir. Örneğin, çocuk koruma hizmetlerinde YZ algoritmaları, ihmal veya istismar riski yüksek vakaları önceden tespit edebilir; yaşlı bakımında sensör tabanlı izleme sistemleri, sağlık ve güvenlik risklerine hızlı müdahale imkânı verebilir (Garkisch, 2025, s. 5). Ancak bu teknolojilerin sosyal hizmet bağlamında uygulanması, etik, hukuki ve sosyolojik soruları da beraberinde getirir. Mahremiyet, veri güvenliği, algoritmik önyargı ve insan-robot etkileşiminin toplumsal etkileri gibi konular, bu kesişim alanının çok boyutlu incelenmesini gerekli kılar (Reamer, 2023, s. 16).

Bu açısı bu makale, literatüre dayalı bir analiz ile şu sorulara yanıt aramaktadır:

YZ tabanlı müdahale modelleri sosyal hizmette nasıl tanımlanmakta ve uygulanmaktadır?

Bu modellerin sunduğu fırsatlar ve riskler nelerdir?

YZ'nin sosyal hizmette kullanımı, toplumsal eşitsizlikler ve mesleki kimlik açısından nasıl değerlendirilebilir?

Etik, insan hakları ve sosyal adalet ilkeleri bağlamında YZ uygulamaları hangi sınırlar içinde kalmalıdır?

Bu çalışmanın temel amacı, YZ tabanlı müdahale modellerinin sosyal hizmetin geleceğine yönelik olası etkilerini sosyolojik bir perspektifle analiz etmektir. Bu amaç doğrultusunda:

Kavramsal ve kuramsal çerçeve bölümünde YZ ve sosyal hizmet kavramlarının tanımı yapılacak, teknolojinin sosyal hizmete entegrasyonunun tarihsel arka planı ve sosyolojik teorilerle ilişkisi tartışılacaktır.

Uygulama örnekleri kısmında, sosyal hizmetin farklı alanlarında (çocuk koruma, yaşlı bakımı, engelli hizmetleri vb.) YZ'nin kullanımına dair örnekler sunulacaktır.

Sosyolojik değerlendirme bölümünde, bu teknolojilerin toplumsal eşitsizlikler, mesleki rol dönüşümü ve etik ikilemler üzerindeki etkileri analiz edilecektir.

Son olarak, politika ve uygulama önerileri sunulurken, YZ tabanlı modellerin sosyal hizmette etik, adil ve etkili şekilde kullanılabilmesi için stratejiler önerilecektir.

Bu yaklaşım, yalnızca teknolojik potansiyeli değil, aynı zamanda toplumsal bağlamı da dikkate alan bütüncül bir analiz sunmayı hedeflemektedir. Böylece, YZ'nin sosyal hizmette “yardımcı bir araç” olmanın ötesinde, mesleğin doğasını nasıl şekillendirebileceği üzerine kapsamlı bir değerlendirme yapılacaktır (Solmaz & Kutlu, 2021, s. 174).

Yapay Zekâ Tabanlı Müdahale Modelleri: Tanım ve Temel Özellikler: Yapay zekâ tabanlı müdahale modelleri, sosyal hizmet alanında karar verme, risk değerlendirme, hizmet planlama ve müdahale süreçlerini desteklemek amacıyla geliştirilen algoritma ve yazılımları ifade eder. Bu modeller, genellikle makine öğrenmesi, derin öğrenme, doğal dil işleme ve büyük veri analitiği tekniklerine dayanır (Surden, 2019, s. 1307). Sosyal hizmet bağlamında, YZ'nin amacı insan uzmanlığını tamamen ikame etmek değil, onu tamamlayacak biçimde veri odaklı öngörüler sunmaktır (Wang, 2025, s. 265). Risk değerlendirme sistemlerinden danışmanlık botlarına kadar geniş bir yelpazeyi kapsayan bu modellerin ortak özellikleri şunlardır:

Veri Odaklılık: Geniş ölçekli veri kümelerinden öğrenme ve tahmin yapma (Raaijmakers, 2019, s. 74).

Uyarlanabilirlik: Kullanıcı geri bildirimleriyle modelin kendini geliştirmesi.

Hız ve Ölçeklenebilirlik: Yüksek vaka sayılarında hızlı ve tutarlı analizler sunabilme (Çatal, 2025, s. 313-314).

Bu özellikler, sosyal hizmet gibi acil müdahale gerektiren ve sınırlı kaynaklarla çalışan alanlarda önemli avantajlar sağlamaktadır. Örneğin, çocuk koruma hizmetlerinde algoritmalar, ihmal ve istismar riski taşıyan vakaları geçmiş verilerden yola çıkarak önceden tespit edebilir (Garkisch, 2025, s. 5).

Sosyal Hizmette Teknoloji Kullanımının Tarihsel Gelişimi: Sosyal hizmette teknoloji kullanımı yeni bir olgu değildir; ancak YZ'nin yükselişi bu alanı köklü biçimde dönüştürmektedir. 20. yüzyılın ikinci yarısında sosyal hizmet uygulamalarında bilgisayar tabanlı vaka kayıt sistemlerinin kullanılması, teknolojinin ilk entegrasyon adımlarını oluşturmuştur (Zastrow, 2014, s. 532). 2000'li yıllarda dijital veri tabanları, çevrim içi danışmanlık platformları ve mobil uygulamalar devreye girmiştir. İşyerinde sosyal hizmet gibi alanlarda teknoloji, çalışanların sağlık, güvenlik ve sosyal ihtiyaçlarının yönetiminde önemli bir rol oynamaya başlamıştır (Solmaz & Kutlu, 2021, s. 176). Bugün ise YZ, sosyal hizmette yalnızca idari süreçleri kolaylaştıran bir araç olmaktan çıkıp, doğrudan müdahale sürecinin bir parçası hâline gelmiştir. Örneğin, doğal dil işleme teknikleriyle donatılmış sistemler, danışan görüşmelerinden risk faktörlerini otomatik olarak çıkarabilmektedir (Nikolskaia & Naumov, 2024).

Sosyolojik Perspektifler ve Kuramlar: Yapısal işlevselci bakış açısı, toplumu bir bütün olarak ele alır ve kurumların toplumsal düzenin devamlılığını sağlamak için belirli işlevler yerine getirdiğini savunur (Parsons, 1951). Bu açıdan bakıldığında, YZ tabanlı müdahale modelleri sosyal hizmet sisteminin işlevselliğini artırarak toplumsal düzenin korunmasına katkı sağlayabilir. Örneğin, erken uyarı sistemleri sosyal riskleri önleyerek toplumsal istikrarı destekler. Eleştirel teori, teknolojinin toplumsal eşitsizlikleri yeniden üretebileceğini ve mevcut güç ilişkilerini pekiştirebileceğini vurgular (Horkheimer, 1972). Bu bağlamda, YZ tabanlı sosyal hizmet uygulamaları algoritmik önyargılar içerdiğinde, özellikle dezavantajlı gruplar aleyhine sonuçlar doğurabilir (Reamer, 2023, s. 17).

Teknolojik determinizm, teknolojinin toplumsal değişimin temel itici gücü olduğunu savunur (McLuhan, 1964). Bu yaklaşım, YZ'nin sosyal hizmetteki rolünü “kaçınılmaz bir ilerleme” olarak yorumlar. Buna karşılık, toplumsal inşacılık, teknolojinin kullanım biçiminin toplumsal bağlam ve aktörler tarafından belirlendiğini savunur (Bijker, Hughes & Pinch, 1987). Dolayısıyla, YZ tabanlı müdahale modellerinin sosyal hizmetteki etkisi, yalnızca teknolojinin kapasitesine değil, aynı zamanda mesleki etik, kullanıcı beklentileri ve politik düzenlemelere de bağlıdır.

Etik ve İnsan Hakları Boyutu: YZ tabanlı sosyal hizmet uygulamaları, insan hakları ve mesleki etik ilkeleri açısından titizlikle ele alınmalıdır. Avrupa Birliği'nin Yapay Zekâ Yasası, yargı süreçlerinde kullanılan YZ sistemlerini “yüksek riskli” kategorisinde değerlendirerek, etik, şeffaflık ve hesap verebilirlik standartlarının zorunlu olduğunu belirtmektedir (Çatal, 2025, s. 314). Sosyal hizmette de benzer şekilde: Mahremiyetin korunması, Algoritmik kararların şeffaflığı, Veri güvenliği, Önyargısız karar verme,... gibi ilkeler vazgeçilmezdir (IFSW, 2014; Reamer, 2023, s. 18). Etik perspektiften bakıldığında, YZ'nin sunduğu hız ve ölçeklenebilirlik avantajı, insan ilişkilerinin niteliksel boyutunu gölgelememelidir. Sosyal hizmet, özünde insanî bir meslektir; teknolojik araçlar, mesleğin insani boyutunu güçlendirmeli, zayıflatmamalıdır.

2. SOSYAL HİZMET ALANINDA YAPAY ZEKÂ UYGULAMALARI

Yapay zekâ tabanlı teknolojiler, sosyal hizmetin farklı alt alanlarında giderek daha fazla kullanılmakta ve hizmet sunumunun verimliliğini, doğruluğunu ve erişilebilirliğini artırmaktadır. Bu bölümde, YZ'nin sosyal hizmetteki başlıca uygulama alanları, mevcut literatür ve kuramsal tartışmalar ışığında ele alınacaktır.

Risk Değerlendirme ve Tahmin Modelleri: YZ'nin sosyal hizmette en yaygın kullanım alanlarından biri, risk değerlendirme ve öngörü modelleridir. Bu sistemler, geçmiş vaka verileri, sosyo-demografik bilgiler ve çevresel faktörler gibi çok boyutlu veri setlerini analiz ederek, olası riskleri önceden tespit etmeye çalışır (Wang, 2025, s. 267). Örneğin, çocuk koruma hizmetlerinde kullanılan algoritmalar, istismar veya ihmal riski taşıyan aileleri belirlemede kullanılmaktadır. Bu modeller, sosyal hizmet uzmanlarına vaka önceliklendirmesi konusunda yardımcı olur (Garkisch, 2025, s. 5). Benzer şekilde, evsiz bireylerin barınma krizine girmeden önce tespit edilmesi, yaşlıların ev içi düşme riskinin sensör verileriyle önceden öngörülmesi de YZ destekli risk değerlendirme modelleriyle mümkün hale gelmiştir (Reamer, 2023, s. 18). Ancak, Solmaz ve Kutlu'nun (2021, s. 175) işaret ettiği gibi, risk analizi süreçlerinde teknolojinin sunduğu öngörü kapasitesi, insan uzmanlığının yerini almamalıdır. Çünkü sosyal hizmette risk değerlendirmesi yalnızca veriye değil, bağlamsal bilgiye ve profesyonel sezgiye de dayanır.

Danışmanlık ve Psikososyal Destek Sistemleri: YZ tabanlı sohbet robotları (chatbot) ve sanal danışmanlık platformları, sosyal hizmet alanında özellikle düşük maliyetli ve erişilebilir destek sunma potansiyeli nedeniyle öne çıkmaktadır (Nikolskaia & Naumov, 2024). Bu sistemler, işyeri sosyal hizmetinde çalışanların stres yönetimi, tükenmişlik önleme ve kriz anlarında psikolojik destek almalarını kolaylaştırabilir. Örneğin, Solmaz ve Kutlu'nun (2021, s. 176) tanımladığı “çalışan destek programları” YZ ile entegre edildiğinde, 7/24 erişilebilen otomatik danışmanlık hatları ile desteklenebilir. Çatal (2025, s. 313), bu tür sistemlerin, basit vaka yönlendirmelerinden karmaşık psikososyal sorunlara kadar geniş bir yelpazede rehberlik sunabileceğini; ancak insan danışmanların yerini tamamen almalarının etik ve mesleki açıdan sakıncalar doğurabileceğini vurgulamaktadır.

Büyük Veri ile Sosyal Politika Analizi: Sosyal hizmetin makro düzeydeki işlevlerinden biri, sosyal politika geliştirme süreçlerine veri sağlamaktır (IFSW, 2014). YZ, büyük veri analitiği yoluyla sosyal hizmet alanındaki eğilimleri, ihtiyaçları ve hizmet boşluklarını tespit etmede güçlü bir araçtır (Wang, 2025, s. 269). Örneğin, işgücü piyasasındaki dezavantajlı grupların konumunu izlemek, bölgesel yoksulluk haritaları çıkarmak, sağlık-sosyal hizmet ilişkilerini analiz etmek gibi görevler YZ destekli veri analiziyle daha hızlı ve kapsamlı şekilde yapılabilir. Solmaz ve Kutlu'nun (2021, s.

180) farklı ülkelerdeki işyeri sosyal hizmeti uygulamalarına ilişkin karşılaştırmalı incelemeleri, büyük veri analizlerinin uluslararası ölçekte politika öğrenimi için de kullanılabileceğini göstermektedir.

Çocuk Koruma, Yaşlı Bakımı ve Engelli Hizmetlerinde Kullanım: YZ tabanlı teknolojiler, sosyal hizmetin özel alanlarında somut uygulama örnekleriyle de etkili olmaktadır:

Çocuk Koruma: ABD ve İngiltere’de bazı eyaletlerde, geçmiş sosyal hizmet kayıtları, okul devamsızlık verileri ve sağlık kayıtları üzerinden çocuk istismarı riski analiz edilmektedir (Garkisch, 2025, s. 6). **Yaşlı Bakımı:** Hareket sensörleri ve giyilebilir sağlık cihazları ile desteklenen YZ sistemleri, yaşlı bireylerin günlük yaşam aktivitelerindeki değişiklikleri izleyerek bakım ihtiyacını önceden belirleyebilmektedir (Reamer, 2023, s. 19). **Engelli Hizmetleri:** Yapay zekâ tabanlı iletişim araçları, işitme ve görme engellilerin sosyal hizmetlere erişimini kolaylaştırmaktadır (Çatal, 2025, s. 315). Bu tür uygulamalar, Solmaz ve Kutlu’nun (2021, s. 177) tanımladığı bütüncül sosyal hizmet programlarının dijital dönüşümüne örnek teşkil etmektedir. Ancak, her durumda veri güvenliği, kullanıcı onayı ve etik ilkeler gözetilmelidir.

3. SOSYOLOJİK DEĞERLENDİRME

YZ tabanlı müdahale modellerinin sosyal hizmet alanındaki yükselişi, yalnızca teknik bir dönüşüm değil; aynı zamanda mesleğin toplumsal bağlamını ve işlevini etkileyen köklü bir değişimdir. Bu bölümde, söz konusu teknolojik dönüşümün toplumsal yapı, mesleki kimlik, etik standartlar ve algısal düzeydeki yansımaları sosyolojik bir çerçevede incelenecektir.

Toplumsal Eşitsizlikler Üzerindeki Etkiler: Eleştirel teoriye göre teknolojik gelişmeler, mevcut toplumsal eşitsizlikleri azaltabileceği gibi yeniden üretebilir de (Horkheimer, 1972). YZ tabanlı sosyal hizmet uygulamalarında bu risk özellikle **algoritmik önyargı** ve **dijital uçurum** bağlamında öne çıkmaktadır. Örneğin, risk değerlendirme algoritmaları, geçmiş verilerde yer alan sosyo-ekonomik önyargıları modeline taşıyabilir. Böylece düşük gelirli veya azınlık topluluklar, “yüksek risk” kategorisinde orantısız biçimde yer alabilir (Reamer, 2023, s. 18). Benzer şekilde, teknolojik araçlara erişimi sınırlı olan kırsal bölgelerdeki bireyler, YZ destekli hizmetlerden yeterince yararlanamayabilir (Wang, 2025, s. 268). Solmaz ve Kutlu’nun (2021, s. 181) işaret ettiği gibi, sosyal hizmette erişim adaletinin sağlanması, yalnızca hizmetlerin içeriğiyle değil, aynı zamanda bu hizmetlere erişim imkânlarının eşitliğiyle ilgilidir. YZ uygulamalarının planlanmasında bu dengenin gözetilmesi, toplumsal adalet açısından kritik önemdedir.

Mesleki Rol ve Kimlikte Dönüşüm: YZ, sosyal hizmet uzmanlarının rollerini yeniden şekillendirmektedir. Geleneksel olarak danışman, savunucu, arabulucu ve politika yapıcı roller üstlenen sosyal hizmet uzmanları (Miley, O’Melia & DuBois, 1998, s. 16), artık veri analisti, algoritma değerlendiricisi ve dijital etik danışmanı gibi yeni rolleri de üstlenmek durumundadır. İşyeri sosyal hizmeti bağlamında, Solmaz ve Kutlu (2021, s. 175) sosyal hizmet uzmanlarının bütüncül bir yaklaşımla çalışan sorunlarını çözmek için arabuluculuk, politika geliştirme ve kriz yönetimi rollerini bir arada yürüttüğünü vurgular. YZ entegrasyonu, bu rollerin bazılarını otomatikleştirirken (ör. veri toplama, ön değerlendirme), bazılarını daha stratejik bir boyuta taşımaktadır (ör. algoritma çıktılarının yorumlanması, etik denetim). Bu dönüşüm, meslek kimliğinin insan odaklı doğasını koruma gerekliliğini daha da ön plana çıkarır. YZ’nin sunduğu verimlilik artışı, uzmanların danışanlarla kurduğu insani bağın yerini almamalıdır (Çatal, 2025, s. 314).

Mahremiyet, Veri Güvenliği ve Etik İkilemler: YZ tabanlı sistemler, geniş veri kümeleri ile çalıştığından, kişisel bilgilerin korunması ve veri güvenliği sosyal hizmette öncelikli konulardan biri haline gelmiştir. Avrupa Birliği’nin Yapay Zekâ Yasası, yargı süreçlerinde kullanılan YZ sistemlerini “yüksek riskli” kategorisine alarak, bu sistemlerin **şeffaflık**, **hesap verebilirlik** ve **temel haklara saygı** çerçevesinde çalışmasını zorunlu kılar (Çatal, 2025, s. 314). Sosyal hizmet bağlamında bu gereklilik, danışanların hassas bilgilerini içeren verilerin güvenli depolanması ve işlenmesini içerir. Ayrıca, algoritmaların nasıl çalıştığı ve hangi kriterlere göre karar verdiğinin açıklanabilir olması, mesleki etik açısından önemlidir (IFSW, 2014). Reamer (2023, s. 17), etik ikilemleri “yarar sağlama” ile “zarar vermeme” ilkeleri arasındaki denge olarak tanımlar. Örneğin, bir YZ sistemi risk puanı yüksek çıkan bir aileyi öncelikli müdahale listesine alabilir; ancak yanlış pozitif sonuçlar aile üzerinde damgalayıcı bir etki yaratabilir.

Algılanan Fırsatlar ve Tehditler: Literatürde YZ’nin sosyal hizmete entegrasyonuna ilişkin algılar, hem fırsat hem de tehdit unsurlarını barındırmaktadır. Fırsatlar arasında şunlar öne çıkmaktadır: Hızlı ve veri destekli karar alma (Wang, 2025, s. 266), Hizmetlerin daha geniş kitlelere ulaştırılması (Garkisch, 2025, s. 6), Müdahale etkinliğinin artması (Solmaz & Kutlu, 2021, s. 176), Buna karşılık tehditler ise şunlardır: Algoritmik önyargı ve adaletsizlik riski, Mesleki bağımsızlığın zayıflaması, İnsan etkileşiminin azalması (Reamer, 2023, s. 18) Sosyal hizmet uzmanlarının bu fırsat ve tehditleri dengeli biçimde değerlendirmesi, teknolojinin meslek etiği ile uyumlu şekilde kullanılmasını sağlayacaktır.

4. BULGULAR

Bu çalışma kapsamında incelenen literatür, yapay zekâ (YZ) tabanlı müdahale modellerinin sosyal hizmet alanındaki yansımalarını dört ana tema altında ortaya koymuştur: **teknolojik katkılar**, **mesleki dönüşüm**, **etik hassasiyetler** ve **toplumsal etkiler**. Bulgular, sosyal hizmet çalışanlarının YZ’ye dair algılarının hem olumlu hem de olumsuz yönler içerdiğini göstermektedir. **Teknolojik Katkılar ve Verimlilik Artışı:** Literatürde en sık vurgulanan bulgu, YZ’nin sosyal hizmet süreçlerine getirdiği **hız** ve **verimlilik** avantajıdır. Wang (2025, s. 266), YZ destekli risk değerlendirme

sistemlerinin sosyal hizmet uzmanlarının karar alma süreçlerini hızlandırdığını ve hizmet planlamasında daha isabetli öngörüler sağladığını belirtmektedir.

Özellikle **işyeri sosyal hizmeti** bağlamında, Solmaz ve Kutlu'nun (2021, s. 176) tanımladığı “çalışan destek programları” YZ ile entegre edildiğinde, otomatik vaka önceliklendirme, 7/24 dijital danışmanlık ve anlık kriz uyarı sistemleri mümkün hale gelmektedir. Bu tür sistemler, uzmanların rutin veri girişine ayırdığı zamanı azaltarak danışanlarla yüz yüze çalışmaya daha fazla zaman ayırmalarını sağlamaktadır. **Mesleki Rol ve Kimlikte Dönüşüm:** Bulgular, YZ'nin sosyal hizmet uzmanlarının rollerini yeniden tanımladığını göstermektedir. Geleneksel roller (danışman, arabulucu, savunucu) korunmakla birlikte, uzmanlar artık **veri analizi** ve **algoritma değerlendirmesi** gibi teknik sorumluluklar da üstlenmektedir (Miley, O'Melia & DuBois, 1998, s. 18). Çatal (2025, s. 314) bu durumu, “mesleki bağımsızlığın teknolojik araçlarla desteklenmesi” olarak tanımlamakta; ancak teknolojiye aşırı bağımlılığın karar verme süreçlerinde insani muhakeme unsurunu zayıflatabileceği uyarısında bulunmaktadır. **Etik Hassasiyetler ve Mahremiyet** Araştırmalarda öne çıkan bir diğer bulgu, YZ tabanlı uygulamalarda **etik risklerin** ve **mahremiyet kaygılarının** yüksek olduğudur. Reamer (2023, s. 17-18), algoritmik karar verme süreçlerinde şeffaflığın sağlanmaması halinde, danışan güveninin zedeleneceğini ve mesleki etik ilkelerin ihlal edilebileceğini belirtmektedir.

Avrupa Birliği'nin Yapay Zekâ Yasası, sosyal hizmet alanında kullanılabilecek sistemleri “yüksek riskli” kategorisine dahil ederek, veri güvenliği ve hesap verebilirlik gerekliliklerini zorunlu kılmaktadır (Çatal, 2025, s. 314). Bu durum, sosyal hizmet uzmanlarının yalnızca uygulayıcı değil, aynı zamanda **teknoloji etik denetçisi** rolünü üstlenmelerini de gerektirmektedir. **Toplumsal Etkiler: Eşitsizlikler ve Dijital Uçurum:** Bulgular, YZ uygulamalarının toplumdaki mevcut eşitsizlikleri azaltma potansiyeline sahip olmakla birlikte, doğru uygulanmadığında **dijital uçurumu** derinleştirebileceğini göstermektedir. Horkheimer'in (1972) eleştirel teorisi çerçevesinde, algoritmaların geçmiş verilerden taşıdığı önyargılar, dezavantajlı grupların sistematik olarak olumsuz değerlendirilmesine yol açabilir. Solmaz ve Kutlu (2021, s. 181) Türkiye'de işyeri sosyal hizmetinin bile hâlâ sınırlı tanınırlığa sahip olduğunu vurgulayarak, teknolojik araçların bu bilinç eksikliğini gidermek için stratejik biçimde kullanılmasının önemine dikkat çekmektedir. YZ tabanlı sistemlerin eğitim, altyapı ve erişim olanaklarıyla desteklenmemesi durumunda, yalnızca teknolojiye erişebilen kesimlerin avantaj sağlaması riski vardır.

Olumlu ve Olumsuz Algıların Dengesi: Literatürden elde edilen bulgulara göre sosyal hizmet çalışanlarının YZ'ye bakışı şu şekilde özetlenebilir:

Olumlu Algılar:Hızlı ve veri destekli karar alma (Wang, 2025, s. 266), Daha geniş hizmet erişimi (Garkisch, 2025, s. 6), Kriz yönetiminde erken uyarı kapasitesi (Solmaz & Kutlu, 2021, s. 176).

Olumsuz Algılar: Algoritmik önyargı ve adalet sorunları (Reamer, 2023, s. 18), İnsan etkileşiminin azalması (Çatal, 2025, s. 314), Mesleki özerkliğin zayıflama riski (Miley, O'Melia & DuBois, 1998, s. 20), Bu çift yönlü algı, YZ'nin sosyal hizmetteki rolünün gelecekte hangi çerçevede şekilleneceğinin, politika yapıcılar ve meslek örgütlerinin yaklaşımına bağlı olduğunu göstermektedir.

5. TARTIŞMA

Yapay zekâ (YZ) tabanlı müdahale modellerinin sosyal hizmet alanındaki yeri, literatürde hem **fırsatlar** hem de **tehditler** perspektifinden tartışılmaktadır. Bu çalışmada elde edilen bulgular, önceki araştırmalarla önemli ölçüde örtüşmekte ve küresel tartışmaların yerel bağlama nasıl yansıdığını göstermektedir.

çalışmanın bulguları, Wang'ın (2025, s. 266) vurguladığı gibi YZ'nin risk değerlendirme ve vaka yönetimi süreçlerinde hız ve doğruluk kazandırdığı yönündeki tespitlerle örtüşmektedir. Literatür, özellikle veri yoğun alanlarda (çocuk koruma, yaşlı bakımı, engelli hizmetleri) YZ'nin karar destek sistemleri aracılığıyla insan uzmanlığını tamamlayıcı bir rol üstlendiğini belirtmektedir (Garkisch, 2025, s. 6).

Buna karşın, Reamer (2023, s. 18) ve Çatal'ın (2025, s. 314) da belirttiği gibi, algoritmaların şeffaf olmaması ve veri setlerindeki önyargılar, sosyal hizmetin adalet ve eşitlik ilkelerini tehdit edebilmektedir. Bu riskler, Horkheimer'in (1972) eleştirel teorisi çerçevesinde, teknolojinin mevcut güç ilişkilerini yeniden üretebileceği uyarısıyla örtüşmektedir.

Sosyal Hizmet Mesleğinin Geleceğine Dair Çıkarımlar: Bulgular, sosyal hizmet mesleğinin geleceğinde **teknoloji okuryazarlığının** kritik bir yetkinlik haline geleceğini göstermektedir. Sosyal hizmet uzmanları, yalnızca danışanla iletişim ve müdahale becerilerini değil, aynı zamanda veri analizi, algoritma değerlendirme ve dijital etik konularında da yetkinleşmek zorundadır (Solmaz & Kutlu, 2021, s. 181). Mesleğin çekirdeğinde yer alan **insan-merkezli yaklaşım**, teknolojik araçlarla desteklenmeli ancak tamamen bu araçlara bağımlı hale getirilmemelidir. Aksi takdirde, Miley, O'Melia ve DuBois'nin (1998, s. 20) uyardığı gibi, mesleki özerklik zayıflayabilir ve sosyal hizmet, teknik bir veri yönetim faaliyetine indirgenebilir.

Ulusal ve Uluslararası Örneklerle Karşılaştırma: Uluslararası düzeyde, özellikle **İngiltere** ve **Kanada**'da YZ tabanlı sosyal hizmet uygulamaları, etik çerçevelerle desteklenerek pilot projeler halinde yürütülmektedir (Reamer, 2023, s. 17).

Bu ülkelerde, teknoloji sağlayıcıları ile sosyal hizmet kurumları arasında **ortak etik protokoller** geliştirilmiş ve algoritmaların bağımsız denetimden geçmesi sağlanmıştır. Türkiye bağlamında ise, Solmaz ve Kutlu'nun (2021, s. 181) belirttiği gibi, sosyal hizmet alanında teknoloji kullanımı hâlen sınırlı ve parçalıdır. YZ tabanlı uygulamalar genellikle pilot düzeyde kalmakta ve ulusal ölçekte standart bir etik ve veri güvenliği çerçevesi bulunmamaktadır. Bu durum, uluslararası uygulamalara kıyasla **kurumsal hazırlık** eksikliğine işaret etmektedir.

Tartışmanın Genel Çerçevesi: Bu bulgular ve karşılaştırmalar ışığında, YZ tabanlı müdahale modellerinin sosyal hizmette sürdürülebilir biçimde kullanılabilmesi için üç kritik unsur öne çıkmaktadır: **Eğitim ve Kapasite Geliştirme:** Sosyal hizmet lisans ve lisansüstü programlarına dijital yetkinlik ve algoritma etiği derslerinin eklenmesi. **Etik ve Hukuki Standartlar:** Ulusal düzeyde, YZ uygulamalarına özgü sosyal hizmet etik kodlarının geliştirilmesi. **Kurumsal Altyapı:** Veri güvenliği, mahremiyet ve sistem entegrasyonu konularında kurumsal kapasitenin artırılması. Tartışmanın genel sonucu, YZ'nin sosyal hizmet alanında **insan odaklı teknoloji** anlayışıyla uyumlu şekilde tasarlanması halinde, hem hizmet kalitesini hem de erişilebilirliği artırabileceği; ancak bu sürecin etik ve toplumsal boyutlarının ihmal edilmesi durumunda mevcut eşitsizlikleri derinleştirebileceğidir.

6. SONUÇ VE ÖNERİLER

Bu çalışma, yapay zekâ (YZ) tabanlı müdahale modellerinin sosyal hizmet alanındaki mevcut ve potansiyel etkilerini sosyolojik bir bakış açısıyla değerlendirmiştir. Bulgular, YZ'nin sosyal hizmet uygulamalarına hız, verimlilik ve öngörü kapasitesi kazandırdığı, ancak etik riskler, mahremiyet ihlalleri ve algoritmik önyargılar gibi önemli tehditler barındırdığı sonucunu ortaya koymuştur. Sosyal hizmet mesleğinin özünde bulunan insan-merkezli yaklaşımın korunması, YZ'nin bu alandaki etkinliğinin gelecekte nasıl şekilleneceğini belirleyecektir. Literatür taraması, ulusal ve uluslararası örnekler ışığında üç temel sonuca ulaşmıştır:

Teknoloji ve İnsan Etkileşimi Dengesi: YZ, sosyal hizmet uzmanlarının iş yükünü hafifletmeli, ancak danışan ile kurulan insani bağın yerini almamalıdır (Miley, O'Melia & DuBois, 1998, s. 20). **Etik ve Şeffaflık Önceliği:** Algoritmik süreçler denetlenebilir, açıklanabilir ve bağımsız otoritelerce onaylanmış olmalıdır (Reamer, 2023, s. 18). **Eşitsizlikleri Azaltıcı Yaklaşımlar:** YZ tabanlı hizmetler, dijital uçurumun kapatılmasına hizmet edecek şekilde tasarlanmalı; dezavantajlı gruplar için erişim kolaylığı sağlanmalıdır (Solmaz & Kutlu, 2021, s. 181).

Sonuçlardan yola çıkarak karar alıcı ve yöneticilere politika önerileri sunulabilir.

Sosyal hizmet alanına özgü, YZ kullanımında uyulacak etik ilkeleri ve veri güvenliği standartlarını belirleyen bir yasal düzenleme yapılmalıdır. Kamu kurumları ve sivil toplum kuruluşları, YZ tabanlı sistemlerin bağımsız denetimini yapacak teknik ekipler oluşturmalıdır. Kişisel verilerin korunması kanunu ile uyumlu, danışan bilgilerinin anonimleştirilmesini zorunlu kılan prosedürler geliştirilmelidir.

Sonuçlardan yola çıkarak karar alıcı ve yöneticilere mesleki eğitim ve müfredat önerileri sunulabilir. Sosyal hizmet lisans programlarına, YZ uygulamaları, büyük veri analizi ve algoritma etiği konularında zorunlu dersler eklenmelidir (Wang, 2025, s. 266). Üniversiteler ve sosyal hizmet kurumları iş birliği ile YZ tabanlı vaka yönetimi ve danışmanlık sistemlerinin kullanımına yönelik atölye çalışmaları düzenlenmelidir. Çalışan sosyal hizmet uzmanlarına yönelik, yılda en az bir kez YZ güncellemeleri ve etik yenilikler üzerine hizmet içi eğitim verilmelidir.

Sonuçlardan yola çıkarak karar alıcı ve yöneticilere Etik Standartların Güncellenmesi önerileri sunulabilir. Sosyal hizmette kullanılan YZ sistemlerinin karar verme mekanizmaları, uzmanlar ve kamuoyu tarafından anlaşılabilir biçimde açıklanmalıdır. Danışan verileri, yalnızca belirli ve onaylanmış amaçlar doğrultusunda kullanılmalı; veri paylaşımı üçüncü taraflarla sınırlandırılmalıdır. YZ tabanlı bir kararın yanlış veya zararlı sonuçlar doğurması halinde, sorumluluk zinciri açıkça tanımlanmalıdır.

Sonuçlardan yola çıkarak karar alıcı ve yöneticilere gelecek araştırmalar için öneriler: Alan Bazlı YZ Uygulamaları: Çocuk koruma, yaşlı bakımı ve engelli hizmetlerinde YZ'nin etkinliğini ölçen karşılaştırmalı çalışmalar yapılmalıdır. Kullanıcı Deneyimi Analizleri: Sosyal hizmet uzmanlarının ve danışanların YZ sistemleriyle etkileşim deneyimlerini değerlendiren nitel araştırmalar geliştirilmelidir. Uluslararası Karşılaştırmalar: Türkiye'deki uygulamaların, Avrupa Birliği ve Kuzey Amerika'daki etik ve teknik standartlarla karşılaştırıldığı çalışmalar yapılmalıdır. Genel olarak, YZ tabanlı müdahale modellerinin sosyal hizmetin geleceğinde güçlü bir araç olarak konumlanması mümkündür; ancak bu potansiyelin, mesleğin insani yönünü zayıflatmadan, eşitlik ve etik ilkelerle uyumlu bir şekilde kullanılması gerekmektedir. Bu süreçte, politika yapıcılar, akademisyenler ve saha uzmanlarının iş birliği kritik önemdedir.

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Do ‘MOM Restaurants’ Still Exist? An Analysis of Isparta

GÜRKAN KALKAN

Abstract: Nutritional styles carry information that dates back to humanity and is equipped with cultural data. Nutritional habits that shape the genetic map of society are expected to be supported by businesses that provide local food production. MOM restaurants, known as family businesses, have a share in directing the eating and drinking habits of the region where they are located. This research article addresses the social, cultural and economic importance of MOM restaurants in Isparta. These small family-run restaurants are distinguished from large chain restaurants by the friendly service and traditional flavors they offer. The research consists of findings obtained as a result of interviews and observations conducted with local people and restaurant owners using qualitative data collection methods. The data obtained reveal the contributions of MOM restaurants to the local economy, their role in strengthening social ties and their place in gastronomy tourism. Finally, the protection and support of such restaurants is of great importance for the continuation of local cultural heritage..

Keywords: Mom, Culture, Menu

MOM Restoranlar Kaldı Mı? Isparta İncelemesi

Özet: Beslenme tarzları insanlığın yıllar öncesine dayanan ve kültürel verilerle donatılmış bilgileri taşımaktadır. Toplumun genetik haritasını şekil veren beslenme alışkanlıkları yerel gıda üretimi sağlayan işletmelerce desteklenmesi beklenir. Aile işletmeleri olarak bilinen MOM restoranlar bulunduğu bölgenin yeme-içme alışkanlıklarının yönlendirilmesinde pay sahibidir. Bu araştırma makalesi ile, Isparta’daki MOM restoranların sosyal, kültürel ve ekonomik önemine değinmektedir. Aile tarafından işletilen bu küçük restoranlar, sundukları samimi hizmet ve geleneksel lezzetlerle büyük zincir restoranlardan ayrılmaktadır. Araştırma, nitel veri toplama yöntemleri kullanılarak, yerel halk ve restoran sahipleriyle yapılan görüşmeler ve gözlemler sonucunda elde edilen bulgulardan oluşmaktadır. Elde edilen veriler, mom restoranların yerel ekonomiye katkılarını, toplumsal bağları güçlendirme rollerini ve gastronomi turizmindeki yerlerini ortaya koymaktadır. Son olarak bu tür restoranların korunması ve desteklenmesinin, yerel kültürel mirasın devam etmesi açısından büyük önem göstermektedir.

Anahtar kelimeler: Mom, Kültür, Menü

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GİRİŞ

Yiyecek üreten ve sunan işletmeler sadece yeme-içme faaliyetlerinin gerçekleştiği işletmeler olarak görülmektedir. İnsanların temel ihtiyaçlarını karşılayan ve varlıklarının devamını sağlayan bu işletmeler farklı çıktıları da beraberinde sunmaktadır. Yemeklerin ticarileşmesi ve küreselleşme etkisi ile köklerini kaybetmeyle karşılaşan yemek kültürleri yerel işletmelerin varlığı ile halen varlığını idame ettirmeye devam etmektedir (Bilgiç, 2020:83). Kuşaklar arası aktararak faaliyet gösteren işletmeler arası aktararak reçetelerini de taşıyan elçiler olarak tanımlanabilmektedir. Restoran işletmeciliği temel olarak evden uzakta olan insanların yeme-içme ihtiyaçlarını karşılayan bir işletme türüdür (Pınar, 2015: 51; Küçükaslan, 2006: 9). Bu tür işletmeler insanların beslenme alışkanlıkları üzerinde beklenen menülere sahip olarak görülmektedir. Dışarıda yemek tüketen insanların temel ihtiyaçları dışında duygusal anlamda da aktarım sağlamaktadırlar. Bu restoran türleri bireyin yaşam tarzına, toplum yapısına, mevsim şartlarına, davranış özelliklerine, dini inanışlara, coğrafi özelliklere ve hatta yemeğin servis edilme ve tüketilme şekline göre değişmektedir (Akın ve Gültekin, 2015: 253).

Restoranların ambiyansı, müşterilerin genel yemek deneyimini önemli ölçüde etkileyen ana faktörlerden biri olarak kabul edilmektedir (Liu ve Tse, 2018). Benzer şekilde dekorasyon, mobilya, zemin tasarımı, masa yerleşimi ve temizliğin müşterilerin restoran deneyimlerini nasıl değerlendirdikleri üzerinde önemli bir etkiye sahip olduğu düşünülmektedir (Hyun, 2010). Bu nedenle restoran atmosferinin algılanan memnuniyet ile müşterilerin tekrar ziyaret etme niyeti arasındaki ilişkiyi etkilediği düşünülmektedir (Hyun, 2010; Truong vd., 2017). Restoran ambiyansı genellikle orta ila yüksek düzeyde memnuniyetle yakından ilişkili olduğundan (Clemes ve diğerleri, 2013), lüks etnik restoranları ziyaret eden müşteriler etkileyici bir ortam beklemektedir. Yaratılan bu ortamların yemek ile tüketicilere aile ortamı sağlaması sunumları tamamlayan diğer bir olgudur (Kalkan ve Elçi, 2023:61). Yemek tüketimi, beslenme alışkanlıkları ve kültür

arasında bağlantı kurulan restoranlarda insanlar temel ihtiyaçlarının ötesinde duygusal bağlarda kurmaktadır (Gümüş ve Özata, 2016:1963). MOM restoranların aile işletmeleri olmaları ötesinde yerel yemeklerin menülerinde yer alması umut edilmektedir. Bu tür işletmelerin yemek üretimi haricinde kültürel paylaşımları sürdürmeleri beklentiler arasındadır (Albayrak, 2014:195). Araştırma ile Isparta ilinde faaliyet gösteren MOM restoranların faaliyet yelpazesi ve üstlendikleri görevleri aktarılmaya çalışılarak, özelliklerini koruyup korumadıkları hakkında bilgi sunulacaktır.

LİTERATÜR İNCELEMESİ

Restoran Kavramı Türk Dil Kurumuna (2024) göre, restoran aşevi yemeklerin hazırlandığı ve satıldığı yerler olarak belirtilmiştir. Başka bir tanıma göre ise insanların beslenme ihtiyaçlarını karşılamayı, hizmet ürünleri sunmayı ve yiyecek- içecek üretimi yapmayı amaçlayan, kaliteli hizmet anlayışıyla insanların iyi vakit geçirmesini sağlayan ticari kuruluşlardır (Şengül ve Türkay, 2015:2). Yazın dilde restoranların yemek üretmek ve sunmak dışında başka görevleri de olduğu belirtilmiştir. Bir toplum için farklı görevleri üstlenen bu tür işletmeler farklı disiplinler tarafından da incelenmektedir. Restoranların tarihsel süreçteki gelişimini incelersek, yüzyıllar önce restoranın yemek tüketimi yapılan yer olarak anıldığı dönemde, hatta restoranın böyle bir yer haline gelmesinden yıllar sonra bile şifalı çorba veya çorba olarak tanımlandığını görürüz. (Spang, 2007:19). Restoran işletmeciliğinin tarihsel gelişimi dünyanın ilk yeme-içme hizmeti sağlayan işletmesinin nerede ve nasıl başladığı tam olarak bilinmemekle birlikte 11. yüzyılda (Yüzyıl) Çin'de başladığı bilinmektedir. Bu şirketin ilk modern restoran işletmesi olduğu söylenmektedir (Kılınç ve Çavuş, 2010: 2). Tarih boyunca ücretli ya da ücretsiz olarak insanlığa fayda sağlayan bir yeme-içme sektörü her zaman olmuştur. Bu alanlar zamanla gelişip çeşitlenerek insanların ödeme yöntemlerine özel hizmetler sunmaya devam ediyor.

Çeşitli kaynaklara göre bugün bildiğimiz haliyle yeme içme işletmesi (coffeehouse) 16. yüzyılın ortalarında İngiltere'de ortaya çıkmıştır. 18. yüzyılda Londra'da 300'e yakın kafenin olduğu biliniyor. Modern anlamda yiyecek ve içecek hizmeti veren ilk şirket 1765 yılında Paris'te kurulmuştur (Denizer, 2005: 5-6; Pınar, 2015: 3). Amerika'da ilk restoran konsepti 1827 yılında 'Delmonico' adı altında gerçekleştirilmiştir (Denizer, 2005: 5-6). "Restoran" adı etimolojik ve tarihsel olarak "restaurers" fiilinden türetilmiştir. Bu kelime aynı zamanda iyileşmek, yeniden inşa etmek anlamına da gelmektedir (Yıldız, 2010: 19). 11 Restoran kelimesi 15. yüzyıldan kalmaz. Ludwig'in saltanatı O zamanlar bu kelime "kaybedilen enerjinin geri kazanılması" olarak ifade ediliyordu. Ancak Brillat-Savarin "restoran" terimini çikolata, çorba ve kırmızı et için kullandı ve bu kullanım 19. yüzyıla kadar devam etti. 19. yüzyıldan itibaren şifalı gıda deposu olarak anılmaktadır (Kılınç ve Çavuş, 2010: 3; Bilsel, 2020: 4; Bingöl, 2007: 24). Eskiden hasta ya da yorgun bir kişinin rahat etmesi için yenilen yemek anlamında kullanılan restoran kavramı, artık iyileşme amaçlı da kullanılmaktadır (Korkmaz, 2010: 122).

İlk modern restoran, Boulanger'in insanların seçme hakkına sahip olduğuna inandığı ve müşterilere seçenek sunma konusunda yeni bir yaklaşım getirdiği dönemde Paris'te açılmıştır (Morgan, 2006: 8). Fransız Devrimi'nden sonra ünlü Fransız şefler işlerini kaybedip dünyanın başka ülkelerine taşınarak kendi restoranlarını açarak ellerindeki reçeteleri farklı toplumların beğenisine sunmuşlardır. 1794 yılında Fransa'dan zorunlu olarak ayrılan aşçıların bir kısmı çeşitli Avrupa ülkelerine gitse de büyük bir kısmı Amerika'ya sığınarak restoran kültürünün Amerika'da yayılmasını sağlamıştır (Walker, 2011: 7). Yeme-içme sektörünün bireysel zevk ve isteklere göre tasarlanması nedeniyle bu durum uygarlık tarihiyle yakından ilişkilidir (Türksoy, 2015: 5; Kılınç ve Çavuş, 2010: 2). Tarih boyunca insanlar seyahat ederken barınma, yeme ve içme ihtiyaçlarını karşılamaya çalışmışlardır. Bu insanların ihtiyaçlarını karşılamak için bir zamanlar han ve kervansaray adı verilen bu türden son derece ilkel tesisler kullanılmış olsa da günümüz hizmet anlayışının gelişiminde önemli pay sahibi olduğu bilinmektedir. Yeme-içme sektörünün bireysel zevk ve isteklere göre tasarlanması nedeniyle bu durum uygarlık tarihiyle yakından ilişkilidir (Türksoy, 2015: 5; Kılınç ve Çavuş, 2010: 2). Selçuklular döneminden bu yana var olduğu bilinen han ve kervansarayların insanlara sadece konaklama değil, yeme-içme de sağladığı bilinmektedir (Kılınç ve Çavuş, 2010: 2; Safi, Atnur ve Küçük yıldız, 2020: 127). Bu tesislerin kurulumunda kurulum yerleri arasındaki mesafe ve kullanılan hayvanların seyahat mesafesi dikkate alındı. Konforun ötesinde güvenliğin sağlanması hedefi dikkate alındı. Eski çağlarda insanlar aynı sofrada yer, içerdi, bugünküyle aynı yeme-içme anlayışının olduğu söylenemez. Bu han ve kervansarayların her odasında yiyecek ve içecek satışı yapıyordu. Bu han ve kervansarayların dışında yaklaşık 240 yıl önce yeme-içme hizmeti veren yerler veya lokantalar açılmıştır (Denizer, 2005: 2). Daha önce han ve kervansaraylarda yukarıda anlatılanlara benzer hizmetler verildiği bilinmektedir. İnsanların çalışma alanlarının genişlemesiyle dışarda yemek yeme alışkanlığı başlamış olup restoran kültürünün gelişmesinde ve hızlanmasında önemli bir pay sahibi olmuştur (Yüksekbilgili, 2014:6352). Ekonomik gücün verdiği rahatlıkla yiyecek tüketim alanları çeşitlenmiştir. 19yy. köyden kentlere olan göçün restoran kültürünün yayılmasında önemli rol oynadığı bilinmektedir. İş hayatının yoğunluğu ve kısıtlı zamanın etkin, verimli kullanılmak istenmesi sürecin bir diğer destekçisi olarak görülmektedir (Scanlon, 1993:8).

Türkiye'de restoran işletmeciliğinin geçmişine bakıldığında, restoran konseptlerinden servis yöntemlerine kadar küresel gelişmeleri yakından takip ettiği ve birçok alanda Avrupa ülkelerinin restoran işletmeciliği anlayışlarını layıkıyla benimsediği dikkat çekmektedir (Korkmaz, 2010: 128). Dünya ticaret yolları üzerinde olması Türkiye'nin birçok değişimlerden hızlı etkilendiği ve bu durumu lehine çevirdiği alanlar olduğunu söylemek mümkündür. Ayrıca İstanbul başta olmak üzere diğer illerde yaşayan gayri müslim halklarında bu etkileşimde payı olduğu söylenebilir. Kültürler arası geçiş noktası olarak bilinen Türkiye zengin menüsü ile bölgesel değerlerin yansıtıldığı güçlü lezzetlere sahip olarak görülmektedir. Yemeklerin gelen misafirlerin damak tadına hitap etmesi mutfakın hızlı büyümesinde önemli bir etken

olarak görülmektedir (Eren ve Çelik, 2017:133). Ülkemizde turizm ile hizmet sektörünün yiyecek-içecek alanında gelişmesi ile restoranlarımızın da uluslararası üretim ve sunum tekniklerini uyguladığı görülmektedir. Restoran çeşitlilikleri ile büyüyen bu alan geleneksel olarak çalışan, nesiller arası aktarılmış olan restoranların daralmasına neden olmuştur. İşletim şekli itibarıyla iç içe geçmiş bir yönetime sahip olan bu işletmelerin avantajlı yönleri olduğu gibi dezavantajlı yönleri de bulunmaktadır (Endiren Çelebi, 2018:33). Alanda araştırmaya konu olan MOM restoranlar irdelenmeye çalışılmıştır.

Mom Restoranlar

Amerika'da yaygın olan bu tür işletmeler ucuz, temiz, yiyecek ve içecekleri taze olarak hazırlayan ve servis personeli çoğunlukla kadın olan işletmeler olarak bilinmektedir. Dar kapsamlı bir kadro ile yönetildiği için daha ucuz fiyatlı ürünler tüketime sunulmaktadır. Bu restoranlar genellikle kalabalık yerleşim yerlerinde, genç nüfus oranının yüksek olduğu bölgelerde ve özellikle büyük eğitim tesisleri ve spor sahalarına yakın yerlerde konumlandırılarak süreklilik sağlanmaktadır (Sevim, 2019: 23). Faaliyet gösterdikleri bölgeler, işletme özelliklerindeki benzerlikler ve hedef müşteri grupları açısından fastfood restoranlarıyla rekabet etmektedirler (Başer, 1995: 7; Özata, 2010: 14). Neredeyse tüm aile fertlerinin çalıştığı bu restoranlarda (Kristina vd., 2011:187) yemek maliyetleri dışardan çalışanların sayısı az olduğu için daha uygundur. Yerel ürünlerin tüketime sunulduğu bu mekanlarda ayrıca hamburger, kek ve pizza gibi fastfood ürünleri de üretilmektedir (Koçbek, 2005: 15). Tüm gün açık olan bu tür işletmelerde masaya servis tekniği uygulanmaktadır (Sökmen, 2006: 6). Bu restoranlar genellikle kadın servis personelinin tercih etmesindeki temel sebebin erkeklere göre daha az ücret ödenmesi olarak bilinmektedir. Bu tür işletmeler Anne-Baba işletmeleri olarak bilinmektedir. Bu firmalar pizza, sandviç, hamburger gibi tek çeşit yiyecek satan restoranlarla rekabet etmektedir

Yemek hizmeti almak isteyen insanlar gittikleri mekanlarda ilk önce atmosferin kendileri için uygunluğunu test etmeye başlarlar. Bu durum sunulan yemeklerin lezzetine de etki ettiği bilinmektedir. MOM işletmelerini tercih eden tüketicilerin beklentileri de bu yönde oluşmaktadır (Ünal ve Diğ., 2014:25). Kadın çalışan ve üretenlerinin çoğunlukta olduğu bu tür mekanlar hem gıda hem de ortam açısından daha güvenli olarak atfedilmektedir. Gıda tüketiminin yanında hizmet sunan işletmelerin tarzı ve yaratmış oldukları sinerji tüketicilerin beklediği başka bir olgudur (Auty, 1992:327). Misafirperverlik olarak isimlendirilen bu olgu restaurant seçimlerinde yemek ve fiyat kadar tercihleri etkileyen bir unsur olarak göze çarpmaktadır. İnsanların tüketime ilave olarak bu tür restoranlarda beklentileri çeşitlenmektedir. Sadık müşterileri ağırlıkta olan bu işletmelerde duygusal bağlılıkta oluşmaktadır (Turner, 2023).

Araştırma Sınırlılıkları

MOM restoranların sayı olarak Isparta'da az olmaları ve belirli bir yaş üzerinde kadın çalışanların servis alanında az sayılarda çalışması araştırma sınırlılıklarını oluşturmaktadır. Aile restoranı olarak bilinen MOM restoranlarda genellikle erkek ağırlıklı çalışan olması dünyada yer alan örneklerle tezat bir durum oluşturmaktadır. Bu durum araştırma kapsamını örneklem konusunda daraltmaktadır.

MATERYAL VE METOT

Nitel araştırmada geçerlik araştırmacının araştırmış olduğu olguyu olduğu biçimiyle ve olabildiğince nötr gözlemesi anlamına gelmektedir. Araştırılan olgu ya da vaka ile alakalı bütüncül bir fotoğraf oluşturulabilmesi için araştırmacının elde etmiş olduğu verileri ve eriştiği neticeleri onaylamasına destek olacak birtakım ek yöntemler (çeşitleme, katılımcı teyidi, meslektaş teyidi) kullanılması gerekir. Bu araştırmada geçerlilik ve güvenilirliğin sağlanabilmesi için "çeşitleme" yöntemi tercih edilmiştir. Veri kaynaklarının çeşitlendirilmesi, değişik özelliklere sahip katılımcıların araştırmaya dâhil edilmesi ve bu halde değişik algıların ve yaşantıların ortaya konarak çoklu gerçekliklere ulaşılması bakımından önemli görülmektedir (Yıldırım ve Şimşek, 2008: 267).

Araştırmada nitel araştırma yöntemleri kullanılmıştır. Nitel araştırma yöntemi; "gözlem, görüşme, belge analizi gibi nitel veri toplama yöntemlerini kullanan, doğal ortamdaki algıları ve olayları gerçekçi ve bütüncül bir şekilde ortaya çıkarmak için nitel bir süreçlerden oluşan yöntemdir (Yıldırım ve Şimşek, 2012:39). Nitel araştırmanın amacı, bir konuyu derinlemesine ve ayrıntılı olarak araştırıp katılımcıların sınırlandırmadan daha öznel bilgiye ulaşmayı sağlamayı hedeflemektedir. Bu bağlamda yarı yapılandırılmış görüşme tekniği kullanılarak veriler toplanmıştır.

Bu yöntem, araştırmacıların çalışılan konu hakkında derinlemesine bilgi edinmelerine olanak sağlaması, esneklik sağlaması, çevre üzerinde kontrol sağlaması ve yüksek yanıtlanma oranları gibi fırsatlar sağlaması nedeniyle tercih edilmektedir (Yıldırım ve Şimşek, 2012). Ayrıca özgün bir bakış açısı belirlemek (Baltacı, 2019), zihinsel farkındalık, farklı deneyimler ve tutumlar gibi gözlemlenemeyen bilgilere erişim olanağı sağlar (Bengtsson, 2016; Seidman, 2006). Görüşme formu oluşturulurken Sözcü (2018) ve Taşdan, Albayrak ve Albayrak'ın (2014) çalışmalarında kullanılan sorulardan literatür taraması sonucunda geliştirilen sorular (Kaya ve Şahin, 2018; Şimşek, 2020) kullanılmıştır. Görüşme formatında basit sorular, yönergelerden kaçınma, çok yönlü sorulardan kaçınma gibi ilkeler vurgulanmıştır (Yıldırım ve Şimşek, 2012).

Görüşme Soruları

- Restoranınızı ne zaman ve nasıl kurdunuz?
- Restoranınızın ismi nasıl ortaya çıktı ve bir anlamı var mıdır(açıklayınız)?
- Restoranınızda kaç kişi çalışıyor ve bu çalışanlar arasında aile bireyleriniz var mıdır?
- Menüde hangi tür yemekleri sunuyorsunuz ve bu yemekler arasında özel tarifler nelerdir?
- Menüünüzde hangi malzemeleri tercih ediyorsunuz ve malzemeleri nasıl temin ediyorsunuz?
- Restoranınızın müşteri kitlesi genellikle kimlerden oluşuyor?
- Müşterilerinizden aldığınız geri bildirimler doğrultusunda hizmetinizde ne tür değişiklikler yaptınız?
- Restoranınızın yerel ekonomi üzerindeki etkileri nelerdir?
- İşletmenizi açtığınız günden bu yana karşılaştığınız en büyük zorluklar nelerdir(açıklayınız)?
- Restoranınızın yerel topluluk üzerindeki sosyal ve kültürel etkileri nelerdir?
- Restoranınızın geleceği için ne tür planlar yapıyorsunuz?
- İşletmenizi büyütmeyi veya farklı bir konseptle genişletmeyi düşünüyor musunuz(açıklayınız)?

Isparta da MOM restoran olarak hizmet veren ve örneklem oluşturan işletmeler;

- Street Burger (M1)
- Mis Sos Döner(M2)
- Duman Pizza (M3)
- Suna Döner (M4)
- Doy Doy Tantuni (M5)
- Sakine'nin Yeri (M6)
- Son Durak Kokoreç (M7)

Araştırma Bulguları

Isparta'da Mom restoran olarak hizmet veren işletmelerin daha küçük hacimli işletmeler olarak karşımıza çıkmıştır. Isparta merkezde kayıtlı olarak restoran hizmeti veren 52 işletmeden yedisinin tipik mom restoran konseptlerini sağladığı gözlemlenmiştir. Günümüz koşullarında mevcut durumunu değiştirmek isteyen ya da aynı şartlarda devam etmek isteyen işletme sahip olduğu görülmüştür.

İşletme yapısını analiz etmek ve menü geçmişini anlayabilmek için “Restoranınızı ne zaman ve nasıl kurdunuz?” sorusu yöneltilmiştir. Bu soruya uzun süredir hizmet veren işletmeler ve onlara göre daha yeni işletmeler farklı cevaplar vermişlerdir. Alınan yanıtlar Tablo1’de paylaşılmıştır

Tablo 1. Restoranınızı nasıl kurdunuz?

Katılımcı	Restoranınızı nasıl kurdunuz?
M1	Öz sermayem ile kurdum.
M2	Öz sermayem ile kurdum.
M3	İki ortak ile birlikte öz sermaye ile kurduk.
M4	KOSGEB desteği ile kurduk (Kadın girişimci).
M5	İki ortak ile birlikte öz sermaye ile kurduk.
M6	Öz sermayem ile kurdum
M7	KOSGEB desteği ile kurduk (Kadın girişimci).

Tablo 1. Araştırmacı tarafından oluşturulmuştur.

İşletme isimleri geleneksel bilgileri ve çalışma tarzını yansıtan alanlardan seçildiği bilinmektedir. Marka değerinin önemli bir parçası olarak bilinen işletme isimleri yaratılan markaya duygusal ve fiziksel bir anlam yüklemektedir (Baş ve Şahin 2013: 24). Erdem ve Alimkulova 2016 yılında yapmış oldukları çalışmada işletme isimlerinin küresel anlam taşımasının tamamen sektörel bakış açısından kaynaklandığını vurgulamışlardır. Bu bakış açısı işletme isimlerinin ne denli önemli olduğunu göstermektedir. Araştırmaya konu olan işletmelerin işletme ismi oluştururken bu tür bir uygulamaya dikkat edip-etmediği sorulmuştur. Ve araştırma alanını oluşturan yedi işletme aşağıdaki gibi yanıtları vermişlerdir.

Tablo 2. İşletme İsminin Anlamı Var mı?

İşletme	İşletme İsminin Anlamı Var mı?
M1	Hamburger hızlı yenen ürün olduğu için ve sokak yemeği olduğu için bu ismi koyduk.
M2	Kelime çekicilik ifade ettiği için kullandık.
M3	Taş fırını anımsattığı ve soy ismimiz olduğu için kullandık.
M4	Sadece soy ismimiz olduğu için tercih ettik. Başka bir anlamı bulunmamaktadır.
M5	İsim olarak güçlü bir vurgu yaptığı için kullandık. Yeme hissi uyandırdığını düşündürüyor.
M6	Hem kendi ismim hem de ev yemekleri ürettiğimiz için daha sıcak olacağını düşündük.
M7	Çalışma saatimiz gece olduğu ve buradan eve gidilecek olmasını düşünerek “eve gitmeden önce uğranacak son yer” anımsatması için koyduk

Tablo 2. Araştırmacı tarafından oluşturulmuştur.

“Restoranınızın ismi nasıl ortaya çıktı ve bir anlamı var mıdır(açıklayınız)?”

M1 Soruya “bir süre isim düşündüm ve sonucunda sokak lezzetlerini anımsatması için bu ismi seçtim” yanıtını vermiştir. Aynı soruya “**M3** restoranınızın ismini soy ismimden dolayı duman olarak koydum ve ayrıca fırın tütsüsünü anımsattığı, taş fırını hayal ettirdiğini koydum ve tercih ettik” yanıtını vermiştir.

Mom restoran kültürünü tam olarak taşıyan **M6** ise bu soruya verdiği cevap aslında araştırma temelinde aranan bir veriyi sağlamaktadır. Bu işletme kadın sahibinin yine kadın ismi ile üretim yapıyor olması ev yemekleri ortamını sağlamaktadır. Üretilen hizmet ve sunulan yemeklerin restoran konseptlerine uyumlu olması araştırmanın başka bir alanını oluşturmaktadır. Aile işletmeleri olarak tanımlayabileceğimiz bu işletmeler aynı zamanda kültürel değerleri bir sonraki nesillere aktaran işletmeler olarak bilinmektedir (Yavuz ve Bozaz, 2023: 197). Ancak bu işletmelerin menülerinin geleneksel tatlar yerine uluslararası tatlara yönelmesi taşıdıkları konseptin yok olmaya başladığının göstergesi konumundadır.

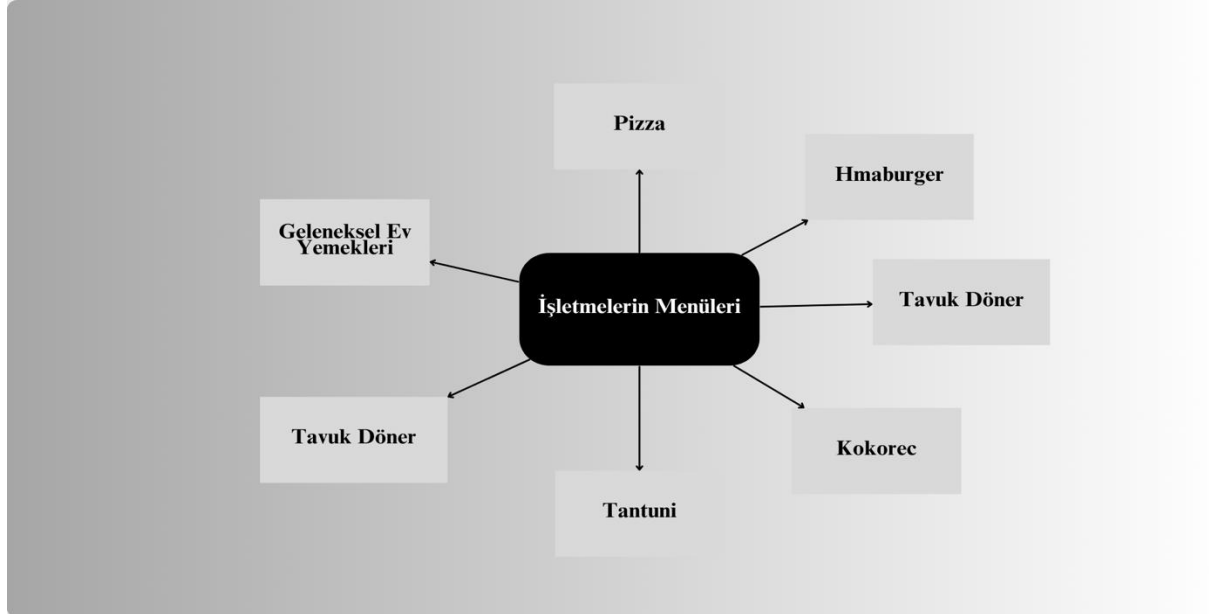
Restoranınızda kaç kişi çalışıyor ve bu çalışanlar arasında aile bireyleriniz var mıdır?

Bu soru karşısında 7 işletmeden sadece 4’ünün de aile bireylerinin çalıştığı ve diğer işletmelerde ise aile dışı personel çalıştırıldığı bilgisine ulaşılmıştır. İşletmelerden M3, M4 ve M6 da nerdeyse tüm ailenin işletme de çalıştığı verisi sağlanmıştır. Aile bireylerinin beraber çalışmasının (farklı yaşların) en önemli katkısı ülke kültürü üzerine olmaktadır. Bilinen reçeteler bu yolla geleceğe taşınmaktadır. Ayrıca kültürel değerler doğal koruma ile varlığını sürdürebilmektedir (Demir, 2025:778). M1, M2, M5 ve M7 ise hem aile bireylerinin hem de aile dışı bireylerin işletmelerinde çalıştırıldığını ifade etmiştir. Bu tür işletmeler daha çok az kapasite yapısına sahip, az bütçeli ve daha ikinci planda mekanlardan oluşmaktadır.

Menüde hangi tür yemekleri sunuyorsunuz ve bu yemekler arasında özel tarifler var mıdır?

Bu soruyu yönelttiğimiz zaman alacağımız cevaplar daha çok klasik ve yöresel yemekler üzerine dönüt beklerken işletmelerin gelenekselden uzak ve hazır mutfaklara yönelmiş olarak cevap alınmıştır. Isparta’daki Mom restoranlarda (aile işletmesi) geleneksel lezzetlerin sunumu (Özdeş, 2019:3) yerine uluslararası yiyecek-içecek sunumları yapıldığı tespit edilmiştir. İşletmelerden M5 ve M6’nın menüleri haricinde diğer işletme menü ve sunum tarzları günümüz koşullarına göre düzenlenmiş ürünlerden oluşmaktadır.

Tablo 3. Mom restoranların yiyeceklere göre menü dağılımı



Tablo 3. Araştırmacı tarafından oluşturulmuştur.

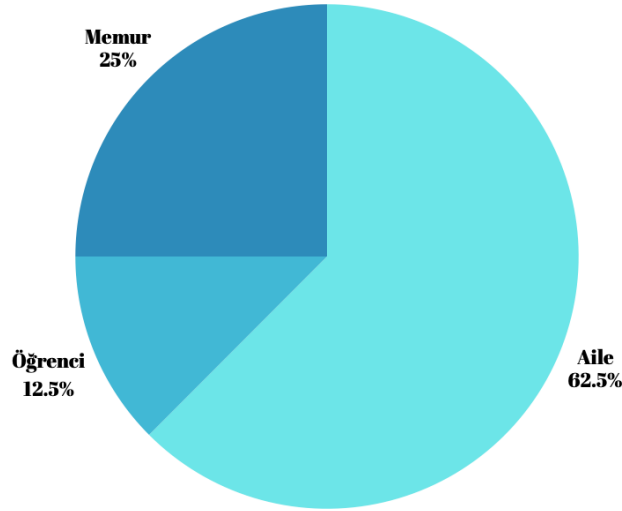
Yedi işletme arasında geleneksel anlamda tek bir yemek üreten restoran olması ve diğer işletmelerin tek bir ürünle varlığını idame etmesi kültürel değer taşıyan ürünlerin körelmesinde etkili olmaktadır. M1 özel bir değer taşımak adına kendi reçetesi ile hamburger ürettiğini ifade etmiştir. Ancak bu yemeğin klasik Türk mutfağı ürünü olmayışı gelecek nesiller için bir değer taşımayacağı düşünülmektedir. Kültürün ve kimliğin bir taşıyıcı olan yemekler değişime uğraması kimlik kaybedilmesi olarak görülmektedir (Demirgöl, 2018:123).

Menünüzde hangi malzemeleri tercih ediyorsunuz ve malzemeleri nasıl temin ediyorsunuz? Araştırma sorusuna neredeyse tüm işletmeler yerel tedarikçilerden ürün hammaddesini sağladıklarını belirtmişlerdir. Paylaşılan reçetelerde et ağırlıklı ürünler daha fazla yer kaplamaktadır. Zengin Türk mutfağı içerisinde et haricinde birçok ana ürün bulunmasına rağmen menüler bu anlayış ile daraltılmıştır (Öncel, 2015:34). Yerel tedarikçi seçilmesine rağmen yerel dokulu yemekler mom restoranlarda yeterli ağırlıkta kullanılmadığı görülmektedir. Bu bilgileri destekler nitelikte cevap işletme **M1** “tedarikçilerimizin %80’i yerli Isparta esnafından temin ediyoruz. Hamburger ekmeğimiz kendi tarifimizdir ancak anlaştığımız bir fırında ürettiriyoruz” yanıtı ile verilmiştir. Uluslararası bir ürün olan hamburger yerel ürünlerle dahi yapılsa da kültürel kimliğimizde olmayışı bu ürünü tüketmek dışında bir anlam karşılamadığı bilinmesi gerekmektedir. Aynı soruya **M6**, geleneksel ev yemekleri ürettiği için yerel tedarikçi kullandığını belirtmiştir. Ve bunun nedenini “yerel lezzeti yakalayabilmek için yerel ürün ve tedarikçilerden yararlanırım” olarak yanıtlamıştır

Restoranınızın müşteri kitlesi genellikle kimlerden oluşuyor?

Mom restoranlar standartta geleneksel menü içeren ürünler üretmektedir. Ve bu tür işletmelerin birincil müşteri grubunu yetişkinler oluşturmaktadır (Yavuz ve Bozaz, 2023:189). Müşteri kitlesini tespit etmeye yönelik yöneltilen soruya “M1, M2, M3, M4, M5, M6, M7 ağırlıklı olarak aile sonra memurlar ve en son olarak öğrenci müşteri yoğunluğumuz vardır” yanıtını vermişlerdir. Verisel bilgi paylaşmak istemeyen işletmelerden bilgi sözel olarak alınmıştır. Elde edilen veriler bir grafik üzerinde aktarılmaya çalışılmıştır.

Grafik1. İşletmelerin Müşteri Dağılımı



Grafik: 1. Araştırmacı Tarafından Oluşturulmuştur.

Yiyecek içecek sektörü ana maddeler değişmese de reçeteleri zamana uyum sağlayan başkalaşmaya uğramaktadır. Yeni nesillerden oluşan kitleye ulaşabilmek adına yapılan bu yenilik anlayışı zamanla gerçeğinden uzak reçetelerin ve damak zevkinin doğmasına neden olmaktadır (Aksoy ve Üner, 2016:17). Rafine mutfaklardan uzaklaşmak mom restoranlarında içinde olduğu bir değişim sarmalına girmektedir.

Müşterilerinizden aldığınız geri bildirimler doğrultusunda hizmetinizde ne tür değişiklikler yaptınız?

Mom restoranlar küçük işletmeler de olsa birtakım sorunları barındırabilmektedir. İşletmelere yöneltilen soru ile işletmelerin karşılaştıkları sorunlu durumlarda çözüm yaratmak için müdahalede bulunmaktadırlar. Alınan yanıtlara göre (M1, M2, M3, M4) yaşanan sorunların işletmenin küçük olmasından dolayı anlık müdahale edilebildiğini ve müşterinin restorandan sorunlu olarak ayrılmasının önüne geçmeye çalıştıkları ifade edilmiştir. Mom restoranların küçük oluşu (Ünlü, 2025:119) bilgi aktarımını ve çözüm yaratmayı hızlandıran bir avantaj olarak görülmektedir.

İşletmenizi açtığınız günden bu yana karşılaştığınız en büyük zorluklar nelerdir(açıklayınız)?

İşletmelere yöneltilen bu soruya alınan yanıtların grafiksel çıktısı Tablo 5’te paylaşılmıştır.

İşletme	İşletmenizi açtığınız günden bu yana karşılaştığınız en büyük zorluklar nelerdir
M1	Mutfak ve servis personeli bulma zorluğu
M2	Personel ve kısa süreli malzeme bulma sorunu
M3	Mutfak ve servis personeli bulma zorluğu
M4	Personel ve mutfak malzemesi bulma sorunu
M5	Mutfak ve servis personeli bulma zorluğu
M6	Servis personeli bulma sorunu
M7	Yerel tedarikçiden belirli dönemlerde ürün bulma sorunu

Kaynak. Tablo 5 araştırmacı tarafından oluşturulmuştur.

Restoranınızın yerel ekonomi üzerindeki etkileri nelerdir?

Sorusuna M2, M3, M5, M6 ve M7 işletmeleri “*yerel ekonomi için en büyük çabamız tedarikçilerimizi yerli seçmekte önem gösteriyor olmamızdır*” yanıtını vermiştir. Çarpan etkisi en büyük olan hizmet sektörü üretildiği alanda geniş çapta ekonomik hareketlilik sağlamaktadır (Alpagu ve Koç, 2016:167). Bu etki onu diğer sektörlerden daha güçlü kılmaktadır. Mom işletmelerin çoğunlukla bulunduğu yere ait insan kaynağı, malzeme kaynağı ve tüketim kaynağına sahip olması gelir çarkının küçük bir alanda dönmesine yol açmaktadır. Bu sektör o bölgede yer alan tüm yan sektörleri harekete geçirebilmektedir.

Restoranınızın yerel topluluk üzerindeki sosyal ve kültürel etkileri nelerdir?

Sorusuna (M1) “*hamburgerin kültürümüzde olmadığı halde Isparta halkına sevdirdiğimizi düşünüyorum*” yanıtını vermiştir. Aynı soruda (M5) “*Isparta’nın bir ürünü olmasa da tantuniyi bir lezzet algısı olarak buradaki insanlar*

tarafından tercih edilebilir hale getirdik” cevabı alınmıştır. Yine aynı soru için M2 “daha önce burada tavuk döner neredeyse sade tüketiliyordu. Biz sos ile sunarak farklı bir lezzete alıştırmaya çalıştık ve bunda başarılı olduk. Hatay usulü tavuk döner satmaya başladık” bilgisini bizimle paylaşmıştır. M6 “geleneksel ev yemekleri sunarak yerel mutfak tatlarının sunumuna devam ettiklerini ve bu sayede Isparta’ya gelen yabancıların bu lezzeti tatmasını sağladıklarını” belirtmiştir. Araştırma konusu kapsamında mom restoran içeriğine tam anlamıyla hizmet eden yedi işletmeden sadece M6 olarak görülmektedir.

Restoranınızın geleceği için ne tür planlar yapıyorsunuz?

Araştırma kapsamında örneklemdeki işletmelerden (M1, M2, M3, M4, M6, M7) işletmelerinin sadece mekânsal olarak büyütme istediklerini ancak şubeleşme ya da farklı bir değişim düşünmediklerini belirtmişlerdir. Bu altı işletme sadece satış hacimlerini arttırmak üzerine planlarını belirtirken M5 şubeleşmeden bahsetmektedir. M1, M2, M3, M4, M6 ve M7 işletmelerinin bu düşünceleri mom restoran özelliklerini koruyacaklarını gösterdiği düşünülmektedir. Alınan yanıtlardan anlaşıldığı üzere farklı bir konseptte geçiş düşüncesi bulunmamaktadır.

Dijitalleşme ve online pazarlama stratejileri kullanıyor musunuz? Eğer öyleyse, nasıl?

Yöneltilen bu soruya iki işletme dışında kullanıyoruz cevabı alınmıştır. Kullanmayan M5 ve M6 ise geleneksellikten yana olduklarını ve bu tür araçları işletmelerin hem yüksek komisyon aldığını hem de taşıma esnasında yemek kalitesine zarar verildiği için tercih etmediklerini belirtmişlerdir. Ancak diğer işletmelerin online pazarlama ve satış için tercih ettikleri firmalar ise:

- Yemeksepeti
- Getir Yemek
- Esnaf Kapıda
- Armut
- Kendi Kuryeleri
- İşin olsun

SONUÇ

Yapılan mülakat sonuçlarına göre Street Burger, Mis Sos Döner ve Duman Pizza restoranları arasında çeşitli benzerlikler ve farklılıklar bulunmaktadır. Üç restoran da yerel ekonomik katkıya önem verirken, temel yaklaşımlarında ve iş stratejilerinde farklılık göstermektedir. Street Burger ve Duman Pizza bireysel olarak kurulurken, Mis Sos Döner bir ortaklık sonucunda faaliyete geçmiştir. İş yapılarında ise Street Burger belirli iş rollerine ayrılmış bir sistem izlerken, diğer iki restoran daha esnek ve ortaklaşa çalışmaya dayalı bir yaklaşım benimsemiştir. Restoranların menüleri, kurucularının özel tarifleriyle dikkat çekmektedir. Street Burger'in hamburger köftesi, Mis Sos Döner'in Hatay usulü döner sosu ve Duman Pizza'nın karışık pizzası, müşteriler tarafından tercih edilen özel lezzetler arasında yer almaktadır. Her üç restoran da genellikle aileleri hedef müşteri kitlesi olarak belirlemiş ve olumlu geri bildirimler almaktadır. Üç işletme de tedarik süreçlerinde yerel kaynaklardan faydalanmaya özen göstermektedir. Bu durum yerel ekonomiye katkıda bulunmalarını sağlarken yerel üretiminde devamlılığını sağlamaktadır. Bu çalışma sistemi yerelde işletmelerin ayakta kalmasını ve varlığını idame ettirmesinde önemli bir rol oynadığı bilinmektedir. Street Burger personel sorunları ve paket servisi ile ilgili sıkıntılar yaşarken, Duman Pizza pandemi dönemindeki zorluklardan etkilenmiştir. Mis Sos Döner ise önemli bir zorlukla karşılaşmadığını belirtmiştir. Street Burger ve Mis Sos Döner büyümek ve yeni şubeler açmak istemekte, ancak farklı konseptler düşünmemektedir. Teknolojik entegrasyon konusunda Street Burger daha yenilikçi bir duruş sergilerken, Duman Pizza şu an bu konuda bir adım atmamıştır. Restoran sahiplerinin geri bildirimlerine dayalı olarak, her bir işletme müşterileri ile güçlü bir bağ kurmayı başarmış, yerel ekonomiye pozitif katkıda bulunmuş ve spesifik lezzetler sunarak kendilerini farklılaştırmıştır. Bu bağlamda, her bir restoranın potansiyel büyüme hedeflerine ulaşmak için dijitalleşme ve teknolojik inovasyonları daha etkin bir şekilde benimsemesi, rekabet avantajlarını artırabilir.

Tüm çıktılar ışığında Isparta'da yer alan mom (aile işletmeleri) restoranlar konsepti olarak bir dönüşüm geçirmiş ve geçirmeye devam edecektir. Küresel koşullar değişime zorladığı en güçlü sektörlerden olan hizmet sektörü önlemler alınmaz ise öz değerlerinden uzaklaşacağı varsayılmaktadır. Yerel kültürün bir parçası ve taşıyıcısı olan mom restoranlara sahip çıkılmazsa kültür elçisi konumundaki değerlerini zamanla kaybedeceği düşünülmektedir.

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Business Resilience Amid Global Turmoil: Economic Development and EU Integration in North Macedonia During the Russia-Ukraine Conflict

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Abstract: In the larger framework of North Macedonia's accession to the EU process, this study examines the effects of the Russia-Ukraine crisis on the country's economic growth and business resiliency. The global instability brought on by the ongoing war has shown weaknesses in North Macedonia's economic performance, especially for small and medium-sized businesses (SMEs), despite the country's continuous attempts to join the EU, which include significant changes and compliance with EU policy. North Macedonia's path to EU membership has been severely delayed by the sanctions placed on Russia, economic disruptions, worries over energy security, and the EU's changing priority towards different regions. The study examines how these outside forces affect North Macedonia's companies, looking at how the crisis affects market access, trade relations, and political alignment. It also talks about the adaptability techniques used by SMEs and the government to deal with these issues, emphasizing the value of innovation, strategic reforms, and regional collaboration in maintaining economic growth. The general consequences of the Russia-Ukraine crisis for North Macedonia's EU membership and its possible future status within the European market are further discussed in this paper.

Keywords: North Macedonia, eu integration, Russia-Ukraine war, economic development, international business

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INTRODUCTION

North Macedonia has been striving to join the European Union (EU) since 1995 when the two parties established diplomatic relations. This can be considered as the first step towards EU integration and the decisiveness that the only goal of this cooperation should be an EU membership. North Macedonia has been seeking to start negotiations on accession to the EU since 2009 when the European Commission (EC) first gave the green light for initiating the negotiations. The Council of the EU has held off on making a decision despite the EC's continuous encouraging evaluation that the nation is prepared to begin negotiations, preferring to wait until the country's name dispute with Greece is resolved (Daskalovski, 2023). Although the political conflict was resolved in 2018, when the 'Prespa Agreement' was signed with the attendance of the prime ministers and foreign ministers of North Macedonia and Greece under the supervision of the United Nations, it still did not result in the start of the negotiations. Unfortunately, there was a new obstacle, as this time Bulgaria vetoed the talks in December 2020. The accession of North Macedonia to the EU is a robust and very significant process for the region – the Western Balkans as well as the EU's enlargement policies in order to extend its influence and expand. The accession of North Macedonia to the European Union (EU) has been on hold for more than 30 years (Mojsovska, 2021).

Nowadays, there is a fast-changing and dynamic world with many happenings, disputes and even wars. Most of these are recognized as regional conflicts, but their impact is more than that. The impact of these 'conflicts' is global and affecting almost every person in the world either directly or indirectly. Besides the Russian-Ukrainian conflict, there are many more armed conflicts ongoing globally. Particularly the Israel-Palestine conflict, war in Yemen as well as numerous armed conflicts in Africa and many more across the world. Every conflict has not only regional, but also wider, global consequences affecting many other countries directly and indirectly.

In this regard, the geopolitical location of the Russian-Ukrainian conflict is very significant directly for the European Union and the continent itself, in this case North Macedonia which is located on the Balkan Peninsula and is seeking EU membership for around 3 decades. North Macedonia is also a NATO member since 2020 when it officially became the 30th member of the Alliance. This move has further impact on the current events looking from the Macedonian perspective (Anghel, 2023).

NORTH MACEDONIA'S POSITION ON THE RUSSIAN-UKRAINIAN CONFLICT

In the Macedonian context, the initial reactions revealed the positions taken by the country starting from the first week of the conflict. Although the state's official statements showed a strong aligning with the position taken by the EU and NATO, a more diverse picture emerged on the sociopolitical level. North Macedonia had taken a significant political step forward by choosing to comply with the EU's new set of restrictive measures regarding the situation in Ukraine and the advice to comply by all EU decisions about the same kind of restrictions. It additionally stated that the country had made the decision to abide by the EU sanctions imposed on the Russian Federation. The Macedonian officials underscored that

these government actions align with the nation's strategic and national objectives as well as its commitment to the Euro-Atlantic interests. The president of North Macedonia, Pendarovski likewise pointed out that although a large portion of political parties have a clear Western orientation, the stances adopted by the general public vary. It is evident that the Macedonians' linguistic, religious, and Slavic heritage makes them sympathetic to Russia. "What worries me is that in the political sense, ethnic Macedonians are sympathetic to Russia's political views. It is especially worrying that over 40 per cent of the public thinks that the Eurasian Union is an alternative to the EU, and some of the parties are predominantly in favour of this option, which could create a problem with future processes." Pendarovski stated in an interview. Furthermore, a public opinion survey conducted on March 7, 2022, showed an increasing gap between the people's and the political official's opinions. According to the poll, 64% of Macedonians believe that having good connections with China promotes their interests in terms of foreign policy, and 60% believe the same about Russia, which is an increase of 11 per cent for China and 6 per cent for Russia since last year. This obviously shows the further disparity between the people and the government and is affected by the 30 year 'EU accession' negotiations which causes disappointment and frustration towards EU and its position (Gjorgjioska, 2022).

CONSEQUENCES OF THE CONFLICT AND NORTH MACEDONIA'S STANCE

The Russian-Ukrainian conflict has significant consequences for European countries since the beginning of the war and it's affecting regional stability, energy security and diplomatic relations. This has strained relations between Russia and many European nations. European countries have imposed sanctions on Russia in response to its actions, leading to economic disruptions and repercussions and a complex geopolitical environment. The conflict has also raised concerns about energy security, as Europe relies on Russian natural gas supplies. Additionally, trade relations have been disrupted and periodically there has been significant issues regarding the grain corridor and transportation of foodstuffs and products (The World Bank, 2023).

North Macedonia as a NATO member and an EU member candidate has been actively engaged in the issue, constantly supporting EU and NATO's positions regarding the conflict. North Macedonia has provided humanitarian and military support to Ukraine and stands behind the decisions of these organizations, it has also joined the sanctions against Russia (European Commission, 2023). As some opposition parties in North Macedonia stated, sanctions against Russia would only harm the Macedonian economy. "The Left" (Levica) was the only political party officially warning about the consequences of these sanctions. Although Republic of Macedonia is not part of the EU, the Government blindly stands behind the back of this organization, was stated in their statement. The initial consequences of imposing such sanctions is facing the losses of over 60 million dollars as counter-sanctions would be imposed on the export of Macedonian products to Russia. In this regard, the citizens could suffer the accidental or collateral damage from these sanctions finding themselves in a new economic crisis and inflation subsequently. These stances are highly negotiable from various aspects such as political, economic and cultural. Each could be very significant and decisive and undoubtedly it is a very complex situation (Gjorgjioska, 2022).

North Macedonia's trade with Ukraine has been disrupted because of the conflict itself and unsecure environment to reach the region, which is a direct effect of the war. However, the decision of imposing sanctions against Russia has disrupted diplomatic and economic relations, as well as trade relations. Mostly the agricultural sectors have been hit and the sectors exporting products to Russia (Cristea, 2022). This means that North Macedonia has disrupted relations with both countries and has been affected severely by this conflict. As mentioned, these decisions and consequences can be negotiated from many perspectives such as economic, political and social and they have different impacts from each side which makes the situation very complex. The SMEs have been caught unprotected and unprepared to these happenings and have been seriously impacted. As Russia has imposed counter-sanctions to North Macedonia these businesses have lost access to both Ukrainian and Russian markets (Panagiotou, 2021).

Another dimension of this conflict is that it attracted the global focus on it, as well as EU's focus undoubtedly. Ukraine, Georgia and Moldova have applied for EU membership just a few days after the start of the war. The EU's focus switched to this region and their applications were processed at record speed as Ukraine and Moldova were immediately granted a candidate status and Georgia a membership perspective to follow (Gjorgjioska, 2022). Also, in 2022 North Macedonia and Albania got the decision to finally open accession talks, which this time was disrupted for North Macedonia for another reason – a veto from Bulgaria which blocks the whole process. In times when the EU rebooted its enlargement policies in light of these events, another political and nationalistic veto has impacted North Macedonia (European Commission, 2023). This has been the basis of EU enlargement policies for the past decades, as the EU would not enlarge without the political will of the countries. Joining the EU is a large and robust process which needs a lot of efforts, for example North Macedonia changed its name in order to resolve the dispute with Greece and join the EU, afterwards the process has been blocked again and this is a huge loss for Macedonian people and businesses, specifically the SMEs which could benefit from the access to the great European market and all the subsidies and investment opportunities. Despite EU membership being most countries long-term foreign policy goal, in reality economic cooperation with Russia and China seems more profitable to some in short-term than resist to EU reforms and get stuck in the process (Gjorgjioska, 2022).

BUSINESSES – SMES SITUATION, REGIONAL AND ECONOMIC DEVELOPMENT IN LIGHT OF THE SITUATION

SMEs in North Macedonia are already short of the support that they could benefit from North Macedonia's EU accession and that is a huge disruption as it is a barricade to the vast European market and free trade. In the meantime, during the accession talks North Macedonia continues improving, implementing and adapting to EU's policies and requirements. North Macedonia has also made a moderate progress in implementing the Small Business Act according to the OECD 2019 SME Policy Index report. The economy continues to offer a business environment receptive to SMEs needs, offering a wide range of support. Moreover, very significantly in OECD's 2022 report it is notable that North Macedonia further developed and achieved its highest average scores in various sectors: support services for small and medium-sized enterprises (SMEs); public procurement; access to finance; innovation policy; and SMEs internationalization. While North Macedonia outperforms the Western Balkans and Türkiye average in terms of access to finance, innovation policy, and internationalization, the economy still needs to improve in terms of entrepreneurship. In this terms, in light of the current happenings improvement is not possible, contrary to that there is a great decrease in business activities after the start of the conflict. For a small country and economy such as the Macedonian one it is inevitable to overcome this global conflict without consequences. As mentioned previously, it is even a political choice to impose sanctions on Russia and in advance, be in a disadvantageous position and lose almost all diplomatic and economic ties with such a great partner, especially the exports from Macedonian SMEs have been severely hit by this (OECD, 2022).

Key achievements in business and economic development in North Macedonia highlight advancements within a shifting landscape. Notable advancements include a revision of the legislative framework, the implementation of preventive measures, and reducing the complexity of bankruptcy proceedings for SMEs. The country distinguishes itself in the region by digitizing liquidation procedures, which saves time and money while ensuring creditors' optimal claim recovery. The government's strategy framework for business support services (BSSs) is important, with different financial and non-financial support initiatives designed to help SMEs (European Commission, 2023).

Financial literacy initiatives, such as the Strategy for Financial Education and Financial Inclusion (2021-2025), help to improve the business climate. Efforts to promote greening efforts among SMEs are visible, supported by better access to capital through the Development Bank and the Plan for Accelerated Growth (2022-2026). The two main focuses of North Macedonia's strategic vision are export promotion and SME integration into global value chains (GVCs). Foreign direct investment is attracted to the country due to recent legislative developments like the Law on Strategic Investment and initiatives that promote company establishment in free economic zones. Launching an online business-to-business (B2B) portal is a proactive move that will help North Macedonia become more integrated into global value chains by connecting local small and medium-sized enterprises (SMEs) with foreign buyers. All of these accomplishments point to a country that is actively promoting resilience, economic growth, and international cooperation with an eye towards integration with the European Union. But besides the previous political vetoes and disputes with Greece, the outgoing one with Bulgaria and the Russian-Ukrainian conflict these achievements are in the shadow of these events as well as the accession talks and enlargement policies of the EU have turned more towards Ukraine and the region in order to immediately ensure safety, prosperity and development against Russia (OECD, 2022).

MACROECONOMIC INDICATORS ON THE ECONOMIC EFFECTS OF THE CRISIS AND GOVERNMENT MEASURES

The good news for North Macedonia in this global crisis is that its economy is not tied to Russia and Ukraine, especially it is important to mention that the financial system is not linked to Russian or Ukrainian banks or financial institutions. Yet, there have been a number of indirect effects for Macedonian businesses. Due to significant trade openness, the economy was already feeling the effects of rising prices for essential food and energy supplies in the initial half of the year. By the end of 2022, the country had seen the highest amount of inflation since the early 1990s, when it was 19.5% with an annual average of 14.2%. Besides the SMEs, large firms have been exposed to the energy/electricity price shocks in this period. In contrast, the observed price effect of the imported raw materials might be roughly estimated by taking into account that over half of the economy's consumption of food, beverages, and tobacco is imported, which significantly, if not entirely, increases the price-taking power of domestic businesses. In addition to being reliant on Russian fertilizer supplies, North Macedonia imports almost all of its sunflower oil and wheat, two of the basic necessities whose prices have seen an uncommon increase on the international market (Petreski, 2023).

To prevent a more serious loss of the living standard of households, the government of North Macedonia has mainly focused on regulating the cost of electricity and lowering the prices of certain primary food essentials. Some of the initiatives were directed towards businesses, and some of them were in place to promote the green transition even before the crisis began. Prior to this, during the winter of 2021–2022, the government proclaimed an "energy crisis," which gave them the authority to appropriate more money from the national budget to corporations that produce electricity and provide central heating. Two sets of anti-crisis measures with a combined declared value of 760 million euros were approved for 2022. Sixteen of the thirty-three measures in the two packages were directed at businesses (or businesses and households) (Government of the Republic of North Macedonia, 2023).

The Macedonian Government has taken numerous measures in light of the conflict's impacts and the counter-effects of the sanctions against Russia. Subsidizing the cost of electricity for users in the regulated market (households and small businesses). Lowering the cost of thermal energy (for users who use central heating in homes and small businesses). The methodology for determining power prices for consumers in homes and small businesses in the regulated market has changed. Loans at interest rates no higher than 1.6% that are used to fund renewable energy and energy efficiency projects. A new channel to help the economy transition to a green economy via the European Investment Bank. Green finance is available through commercial banks, the United Nations Development Program, and the European Bank for Reconstruction and Development (for households and SMEs). financial assistance for businesses in the form of direct loans from the Development Bank. Funding provided by interest-free working capital loans from commercial banks. Among these, also credit line for agricultural product production, processing, and export is obtained. Subsidized rate of 80 EUR/MWh for businesses that produce food. Using the Development Bank's Guarantee Fund. Low-interest rates on loans from commercial banks to companies that plan to reinvest their profits are being subsidized. Measure that allows basic food products and raw materials subject to import duties from any country to be imported autonomously. VAT exemption applies to the import of natural gas, electricity, heat energy, and cooling energy. assistance in the form of consultations for the creation of feasibility studies for renewable energy and energy efficiency projects. Most of these measures are towards supporting the SMEs during this crisis, as well as large companies and households (Government of the Republic of North Macedonia, 2023).

CONCLUSION & KEY CONSIDERATIONS

In conclusion, there have been many difficulties and complexity in North Macedonia's path toward EU integration because of the complicated dynamics of the country's prolonged conflict between Russia and Ukraine and its wider effects on international security and economic stability. Even though the country has been resolutely committed to joining the EU since 1995, political obstacles including the dispute over the country's name with Greece and more recent vetoes from Bulgaria hindered progress. The ongoing conflict between Russia and Ukraine has highlighted the extent to which geopolitical events are global in nature and have far-reaching implications for countries hoping to enter into international alliances. Regarding the conflict, North Macedonia's attitude is fully aligned with that of the EU and NATO, although public opinion indicates a more diverse viewpoint, shaped by the country's historical, linguistic, and cultural links to Russia. The country's businesses, especially SMEs, have faced difficulties as a result of the economic effects of the sanctions against Russia, which have affected trade relations and especially, the agriculture industry. The differences in public opinion and official government decisions serve as a reminder of how difficult it is to strike a balance between national security and foreign alliances

Considering that North Macedonia's economy is not fully or to a large extent connected to either Russia or Ukraine, the country's macroeconomic resilience is seen in its exposure to the conflict between these two countries. However, the current state of the world economy, which is characterized by growing costs for necessities and energy, has put businesses under pressure from inflation and presented difficulties. North Macedonia has shown progress in business and economic development despite these obstacles, with advancements in sectors including financial services, innovation, and support for small and medium-sized enterprises. The government has taken proactive steps to reduce the impact of the crisis on its people and economy, as evidenced by its efforts to control power prices, subsidize thermal energy, and offer financial help to businesses.

North Macedonia's commitment to EU integration continues to be the main focus despite regional and global uncertainty. The country has the foundation for future adaptability and prosperity through its efforts to improve business environments, improve international cooperation, and comply with EU policies. The path that North Macedonia takes will be significantly shaped by its ability to manage the complexities of the Russian-Ukrainian conflict and its effects. Important factors in this regard include economic diversification, strategic policymaking, and a constant dedication to EU membership, which is proven by the country's dedication and action during the past years and decades (European Commission, 2023).

Essentially, the complex issues this study analyzes highlight the complex interactions among national goals, global events, and the need for political and economic integration. The conclusions and observations from North Macedonia's experience provide valuable insights for scholars, politicians, and other stakeholders who are engaged in the discussions about international relations, economic development, and the pursuit of peace and stability in a constantly changing global environment with important new perspectives.

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Opportunities for Teaching Blockchain Technology at University

KRISZTIÁN BÁLINT

Abstract: Blockchain technology is used in many areas of IT, from financial solutions to data management and data security. Despite its many applications, blockchain education has not yet become widespread in the educational system, even though it is an important part of today's IT sector. Since universities provide students with up-to-date knowledge, it is important to examine the possibility of teaching blockchain technology in university settings. The research aims to explore the needs of Serbian and Hungarian students for blockchain education. The research involved students from the Department of Informatics at Singidunum University in Serbia and students from the Institute of Business Sciences and Digital Knowledge at the Keleti Károly Faculty of Business and Management at Obuda University. The research revealed that students in both Hungary and Serbia are in demand for blockchain technology-based education. They specifically stated that they would like to learn about blockchain, its technical side, to better understand its structure and operation, as well as its approach from an economic perspective. Without a modern educational curriculum and up-to-date teaching materials, universities would be in a difficult situation, so they must constantly renew themselves. The introduction of blockchain technology in education would certainly represent a new and up-to-date direction in the future.

Keywords: Blockchain, data storage, university education, database security, educational method.

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1. INTRODUCTION

Digital money is a novelty these days, and as a result, there is no unified opinion about cryptocurrency in the financial sphere yet. Bitcoin, with its structure based on a specific IT system, divides both experts and the public. Many arguments and counter-arguments have been put forward regarding Bitcoin so far. Economists, IT specialists, lawyers, and university lecturers are currently addressing the topic of digital money and the possibilities of its practical use in everyday life from many aspects. Currently, the position of banks regarding BTC is not uniform, and this applies not only to the domestic banking system, especially the National Bank, but also to the entire European Union, the United States, China and Russia. In the absence of a unified regulatory system, more (skeptical) questions arise around digital money than possible solutions.

Scientific works on cryptocurrency have slowly begun to appear, with many innovative ideas emerging so far, such as the further development of digital wallets and the possible creation and promotion of Bitcoin acceptance points. However, to our knowledge, no scientific works have yet been published on Bitcoin education and its methodological issues and the pedagogical and didactic issues that arise. Due to the novelty of Bitcoin, these needs are starting to emerge in the labor market today. The popularity of digital money is increasing exponentially in the service sector, but the number of properly trained and skilled Bitcoin professionals is very low. Blockchain-based distributed ledger technology (DLT) facilitates the creation of shared, distributed, ledger-like databases, the integrity of which is secured by some form of honest majority consensus across the parties operating the system (Péter, Kocsis, 2024). The link between blockchain technology and cryptocurrencies is one of the most significant steps in the reform of IT and the financial world in recent decades (Sallai, Csiszarik-Kocsir, 2024).

2. POSSIBLE PEDAGOGICAL ASPECTS OF DIGITAL MONEY EDUCATION

The gradual expansion of an individual's knowledge and understanding of money can be observed already in childhood. Understandably, learning how to use money is rooted in early economic experiences, such as doing family shopping together or providing pocket money for children. Looking at the phenomenon in a broader context, people learn the competencies and knowledge necessary for adaptive economic behavior and the accumulation and rational spending of money through consumer socialization. Through this intensive learning process, children also assign various attitudes and emotional characteristics to money as a tool, which then strongly determine their money management characteristics as adults (Nagy, Tóth, 2012).

Children come into contact with money at a very young age. At first, only indirectly, when they participate as mere observers when their parents buy and pay, and then, as the years progress, they become more directly involved in the process.

Nowadays, the rise and gradual development of digital money is an extremely topical issue, which at the same time divides the professional audience and the public, as the dominance and widespread acceptance of paper money has been undisputed for many centuries. However, in the 21st century, with the emergence of cryptocurrency, we can witness a paradigm shift that has surprised even those working in the financial sector therefore, in today's digital age, the question of cryptocurrency education inevitably arises which, if implemented, would be the task of schools. It is important to note that the task of schools is to equip students with up-to-date knowledge, which they can then successfully apply in the labor market. In addition, it is the task of teachers to motivate their students in the right way during their academic years, thereby helping them to successfully graduate.

The real success of students in their studies is primarily determined by learning motivation, meaning its presence or absence is extremely important for students' progress, so it is no coincidence that it is given a prominent place in pedagogy (Szűcs, 2014).

Motivation is the set of motives of various origins that encourage the student to learn and keep the desire and determination to learn alive until the end of the learning process. There is no learning at any age without motivation.

It is wrong to assume that Bitcoin start-ups are only started by newly graduated students interested in innovation, who are interested in the new BTC technology, but also by large multinational companies and huge banking networks that have a serious financial background and sufficiently qualified professionals and more than once try to implement certain elements of Bitcoin solutions into their own existing systems. In addition, they are also motivated by the extra financial gain. Nothing proves this better than the New York Stock Exchange, BBVA and USAA international banks were among the first to become investors in Coinbase (a virtual wallet that uses Bitcoin). In April 2015, Goldman Sachs partnered with Circle, a start-up that enables Bitcoin transfers (e.g. "person to person") via an app, with a \$50 million funding round.

Among other activities, the experimental group called Citigroup is also negotiating with the government about a state-backed digital currency. Swiss bank UBS opened a Bitcoin technology lab in London last spring to study whether the virtual currency could facilitate faster bank transfers. The Bank of New York Mellon, the world's largest custodian bank, is exploring the role of blockchain not only in transfers but also in managing stock dividends. The Visa card issuer has established laboratories in both Europe and the United States where they are investigating various uses of blockchains.

Barclays, a British bank, is working with five other Bitcoin technology startups in London and New York. These include Atlas, which focuses on mobile banking in developing countries, and Everledger, which uses a distributed ledger to track the origin of diamonds, thereby reducing diamond fraud and theft. An internal team at Spanish bank Santander is experimenting with digital currencies, while the bank's InnoVentures fund will soon reportedly support blockchain startups (Shin, 2015).

According to Tomasz Tunguz, a venture capital analyst at Redpoint, Bitcoin has been the fastest-growing startup investment area since mid-2012. Despite this, Bitcoin startups enjoy a very small share of total funding – last year they accounted for just 0.18% of total funding.

Bitcoin's 151% growth is exemplary, as it is an officially unregulated currency. Despite this, numerous cryptocurrency-based start-ups have emerged, which clearly demonstrates the popularity of BTC today, and also that not all BTC-based payment solutions have been exploited, as new ones have been appearing on a daily basis since 2009, when Satoshi Nakamoto laid out the foundations of the cryptocurrency.

Economics explains the motivation of individuals participating in education by saying that schooling increases an individual's productivity and reduces unemployment (Polónyi, Timár, 2006).

Therefore, one of the goals of the research is to map students' needs for Bitcoin education, as education plays an important economic role, as investment in human capital will result in higher-educated students earning higher incomes than their less-educated peers. Simply put, higher education is associated with higher earnings. According to theorists, this is because investments in human capital increase an individual's productivity. Higher education is therefore associated with higher earnings as a result of higher productivity, and higher productivity is a consequence of learning/teaching or other forms of human capital investment. This idea accepts the theory of marginal productivity, which states that the demand for labor is determined by an individual's marginal contribution to corporate revenues. In this case, earnings express productive capacity, proportional to previously accumulated human capital, where:

$$W_t = W^e E_t$$

W_t = wages in period t ,

W^* = the rental price of a unit of human capital,

E_t = units of human capital.

Blockchain education could be implemented based on the following framework, such as:

- Technological Factors will positively influence blockchain technology adoption in education.
- Organizational Factors will positively influence blockchain technology adoption in education.
- Environmental Factors will have a positive influence on blockchain adoption in education.
- The adoption of blockchain technology will be positively associated with performance in education (Toader, et al. 2024).

The framework for blockchain education is presented in the first figure below.

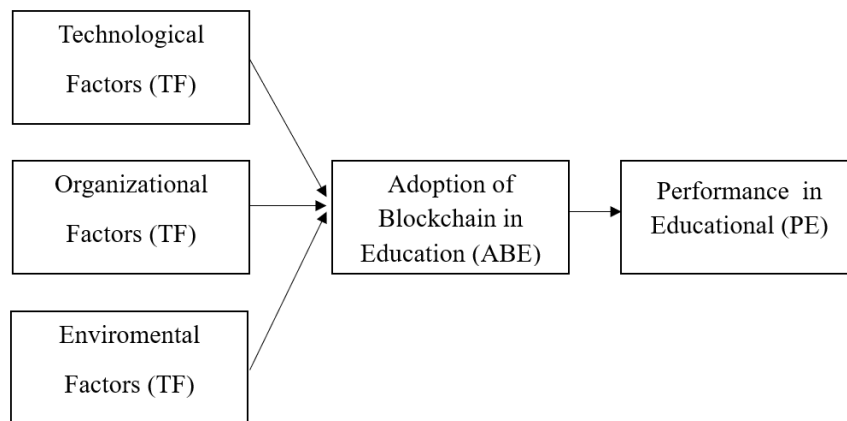


Figure 1. The framework for blockchain education (Toader, et al. 2024).

In contrast, due to the external effects and public good nature of education and higher levels of education, we generally consider factors such as graduates' lower dependence on the welfare system, lower crime rates, greater propensity for innovation, more environmentally and health-conscious lifestyles, or their greater contribution to public spending due to higher incomes to be community benefits (Golovics, 2015).

We are living in a time of economic and social challenges, so cryptocurrency-based education is becoming an increasingly relevant topic these days. In the modern market economy system, it is definitely important to address the topic of Bitcoin as a digital currency based on innovation in a more in-depth manner and to examine in detail the possible aspects of e-learning education.

A systemic approach to the environmental relations of higher education institutions is possible – similarly to corporate organizations – through input and output relations. In today's regulatory environment, there is real and intensifying competition between higher education institutions. Education is at the heart of higher education activity. The existence of a higher education institution – depending on the regulatory environment – may depend to a significant extent on student demand for the institution's courses (Veres, 2010).

In economics, human capital theory provides the most useful framework for exploring the relationship between educational quality and economic growth. Although there are many variations of economic models that explain economic growth in terms of human capital characteristics, the most commonly used models belong to the family of endogenous growth models. In these models, knowledge and the quality of human capital are the central explanatory factors of economic development. Education continuously increases the innovation capacities of the economy, helps create new ideas and new technologies, and thus continuously contributes to increasing productivity (Fazekas, 2011).

Not surprisingly, perceived support from the families of entrepreneurial university students is positively related to students' intentions: university students with an entrepreneurial family member are more likely to start their own business, while students who perceive negative reactions from their families are less likely to be successful in starting their own business (Pruett, 2009).

According to this approach, it is very important that students receive sufficient support from their families. By this support, we are not talking about financial support, but rather, a support in which parents encourage their children to have new, thoughtful and rational ideas. It is well known that the Bitcoin topic divides the community on many issues, yet new BTC-based ideas are emerging on a daily basis. Nothing proves this better than the emergence of numerous start-up businesses.

Innovation refers to an intellectual product and/or service resulting from research, development, or expertise that has novelty value and can therefore be utilized in the economy with temporary extra profit, or at least with temporary exclusive

rights. Relaxing the strictness of the definition, this definition includes essentially all possibilities for utilizing the university's free teaching and research capacity (Polónyi, 2005).

Bitcoin and altcoins can be considered as innovations in the field of digital money, despite the fact that many national banks do not recognize them as official currencies. The Bitcoin market is nevertheless growing steadily, as it has many advantages that other currencies do not. In the case of Bitcoin, adapting to labor market needs is a very complex and diverse task, as the cryptocurrency could be taught from different aspects at different universities.

3. EMPIRICAL RESEARCH

Students from Hungary and Serbia participated in the empirical research. The detailed distribution is presented in the first figure below.

Table 1. Distribution of students by university

Countries	Universities	Distribution of Students by University
Hungary	Institute of Business Sciences and Digital Knowledge at the Keleti Károly Faculty of Business and Management at Obuda University	37
Serbia	Department of Informatics at Singidunum University	52
Number of Students		89

Hypothesis: It can be assumed that the students participating in the research would be happy to learn about blockchain technology within a university setting.

The first question of the empirical research aims to explore whether university students in the two countries have heard of blockchain technology, including Bitcoin? This is important because students can only give relevant answers if they understand the concept behind the question. Regardless of the university, the majority of students (chi-square test: $p=0.059$) answered yes to the question. The responses received are presented in the second figure below.

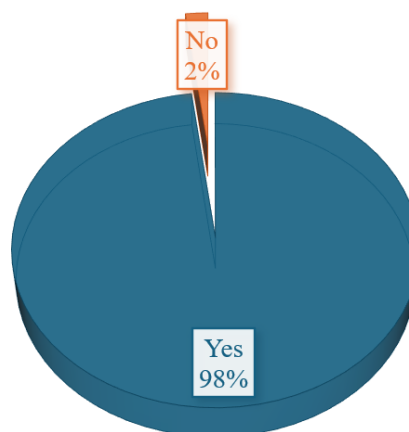


Figure 2. Have you heard of Bitcoin blockchain technology?

The next second question is intended to examine the approach from which students would like to learn about blockchain technology. The majority of students, regardless of the universities (chi-square test: $p=0.064$), preferred the economic side over the technical and engineering side. The responses obtained are presented in the third figure.

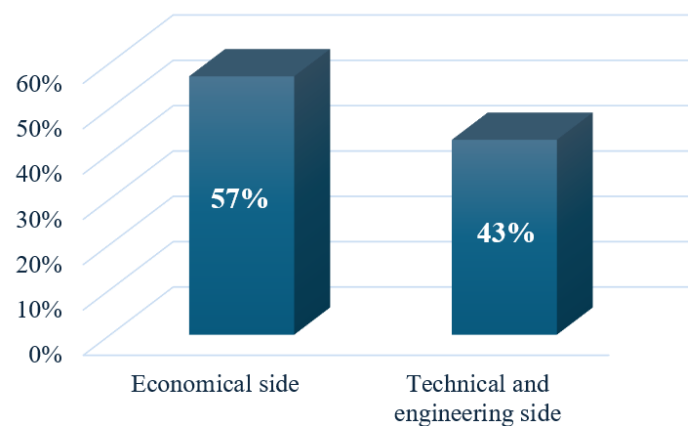


Figure 2. Which side of blockchain technology would you most like to learn from? The economics side or the engineering and technical side?

It can be stated that students accept both types of blockchain-based education and consider it a good solution, both from an economic and technical perspective. By developing appropriate topics, it is assumed that this new subject and curriculum would be widely accepted by students.

4. DISCUSSION AND CONCLUSIONS

Cryptocurrency has always divided public opinion. Some believe that blockchain technology holds great potential, while others believe that it is just an “ordinary” pyramid scheme. However, understanding Bitcoin and the blockchain behind it requires learning. Thanks to its rapid development, it is now used in many areas of life, from IT to financial and economic solutions.

Since its inception, new blockchain-based solutions have been continuously emerging, which today can provide effective solutions to even complex problems. Understanding these can be most effectively achieved within a university educational framework.

The research sheds light on the fact that both Serbian and Hungarian students are in demand for blockchain technology-based education. The majority of students participating in the research would like to deepen blockchain education from an economic perspective, but a large proportion of students are also interested in information blockchain solutions.

It can be stated that blockchain-based education is indeed a novelty within a university setting, as new blockchain solutions are emerging on a daily basis, which are an educational necessity. Educational institutions that teach blockchain technology are certainly providing their students with up-to-date knowledge.

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Trust and Security Issues- Cognitive Based And Emotional Trust

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Abstract: The basis of all communication is security and trust. This study aims to be a secondary research summarizing scientific articles and research investigating effective organizational communication. Effective organizational communication is important, among other relevant factors, in terms of the quality of life of the employees in the organization, in terms of the organization's partner relationships, and in the issue of adapting to continuous changes. Effective organizational communication enables people to interpret reality together, summarizing individual interpretations.

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INTRODUCTION

Every day we live in a state of fluctuation between trust/distrust. Deep within trust/distrust, in relation to relationships between people, an insoluble aporia can be grasped: there is trust, but not yet; there is no trust, but nevertheless there is. No community can function without the presence of trust, but at the same time, no community can assume the full realization of trust. In other words, there is always a given level of trust or distrust, in which trust is constantly exposed to distrust and vice versa. The full fulfillment of trust can be considered a borderline situation or an extraordinary state, which manifests itself in exceptional moments of peace (finding love, security, harmony with ourselves and the world). Similarly, the radical form of distrust is fulfilled in war (we fear losing our loved ones or our lives, we fear becoming homeless). (Kovács, 2021)

Effective organizational communication is an optimal expectation that accompanies everyday “peaceful” organizational operations, but it is also of outstanding importance in conflict situations. This study aims to present the relationship between the components of trust and the possible consequences of the meeting of conflict management methods.

MATERIAL AND METHOD

Organizational theory holds that communication is the lifeblood of all organizational cultures, and even organizations. (Vári, 2016). According to Fukuyama (1995), due to the social embeddedness of the economy, relationships are regulated not only by the cost-benefit principle, contracts, and sanctions that assume self-interest, which the author calls the “tax of distrust” due to their cost implications, but also by mutual trust between members of society.

Mutual trust as social capital influences the willingness to associate and can serve as a basis for the effective exploitation of economic opportunities of companies, as well as the well-being of the organization's members (Sass, 2011).

Research shows that family businesses are better able to exploit trust, which can not only provide them with a serious competitive advantage (Varga&Csiszárík, 2017), but the spread and successful operation of family businesses can also strengthen the resilience of society and the economy. That is The study of organizational trust is justified by research results that indicate that the beneficial effects of trust can be identified for both individuals and organizations. At the individual level, this includes the role of trust in reducing workplace stress and increasing performance. At the organizational level, trust contributes to increased organizational efficiency and performance by facilitating cooperation, obedience, and information sharing.

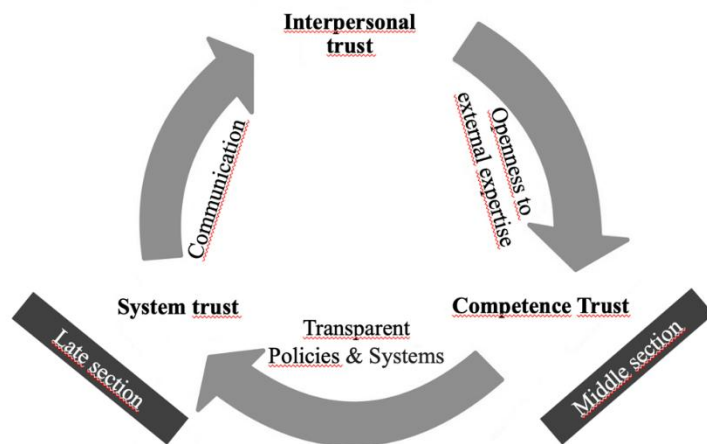


Figure 1: Sustainable trust cycle

Table 1: Benefits of organizational trust

The benefits of organizational trust	cost reducer	driving force for organizational change
	conflict reducer	driving force
	the organization's performance increases	ethical behavior
	competitive advantage	corporate collaborations
	employee dissatisfaction	teamwork
	successful negotiations	commitment

RESULTS

Based on the questions posed by Sass (2005), he conducted an investigation of two phenomena. One is to explore and measure the components of organizational trust - according to its object and basis -, to examine the relationship between these components, and to identify and typify the trust patterns of the organizations examined, which differ according to their components. The other goal is to examine individual decisions dependent on the level of organizational trust or lack of trust in organizational trust dilemmas. The investigation supports the hypothesis that in a given social system, organizational trust, according to its object, applies to three areas: organizational operation, the immediate manager, and the group of colleagues. Organizational trust is a complex phenomenon that is composed of components that can be separated according to the trust object (predictability, reliability, benevolence), which can be measured separately. Sass (2005) found that cognitive and emotional trust bases appear in relation to all three trust objects.

Since trust is formed on a different experiential basis in relation to trust objects, and this trust experience in the organization is influenced by institutional, task and personal and intergroup relationship experience, cognitive and emotional trust bases can be distinguished. Regarding the relationship between the individual trust objects, the correlations support our assumption that employee, management and system trust jointly determine trust in the organization. (Sass, 2005).

Swift&Hwang's (2013) paper examines the influence of one conceptualization of trust, one that has two sub-constructs – affective (emotional) trust and cognitive (rational) trust – on knowledge sharing among 157 marketing and sales executives.

DISCUSSION

Trust is essential for the optimal and efficient functioning of an organization (Kuráth et al., 2022). The presentation, description and practical utilization of the organizational presence of trust in the cognitive sense and emotional trust is of outstanding importance. Existing trust has an undeniable impact on competitive advantage, and working and thinking

with the components of trust is necessary in many areas of business life. The effects of trust in interpersonal and economic relationships can be highlighted by the cost-reducing effect of trust. It can directly reduce transaction costs, as it makes control unnecessary. Trust also influences investment decisions. The level of trust within an organization cannot be considered a static phenomenon, as human relationships and life situations are constantly changing. In interpersonal relationships, the presence of trust reduces the number and extent of conflicts, and thus stress at work. The efficiency of cooperation increases, there is no need for multiple checks. However, in the case of excessive trust, suspicion disappears, which makes it possible to cheat and exploit the other.

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A Research on the Process of Bank Carbon Footprints in Türkiye: Grey Forecasting

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Abstract: The purpose of this study is to examine the effects of climate change, one of the most significant challenges of our era, from the perspective of financial institutions. In this context, the research aims to forecast future trends by drawing attention to the carbon footprint data of banks operating in Türkiye. The study utilizes carbon footprint data from Turkish banking institutions. The data encompasses the period from 2012 to 2018. Data from 2012 to 2016 was simulated using the G(1,1) model from Grey Systems Theory. The analysis yielded a relative error margin of 1.39%. Subsequently, using the established analysis, forecast data was calculated extending to 2024. The data from 2017-2018 was designated as control values to validate the model's accuracy. The average relative error margin between the actual values and the predicted values for 2017-2018 was found to be 4.06%. When examining the forecast values extending to 2024, it was determined that carbon footprint data shows an increasing trend. The findings anticipate that banks will experience an increase in their carbon footprint values. The results obtained from this study indicate that banks in Türkiye need to pay greater attention to green banking practices. While these observations, made with limited data, are expected to pioneer future studies in this field. Additionally, this study will contribute to raising awareness in the sustainability policies that banks will implement.

Keywords: Climate Change, Bank Carbon Footprint, Grey Forecasting, Grey Theory

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1. GİRİŞ

Küresel bağlamda ülkelerin karşılaştığı ve ilerleyen süreçte daha da şiddetleneceği düşünülen sorunların başında iklim değişikliği gelmektedir. İklim değişikliği ile mücadelede en önemli adımlardan biri yeşil ekonomiye geçiş konusudur. İlerleyen yıllarda yeşil ekonomiye geçişin daha da önem kazanacağı öngörülmektedir. Buna bağlı olarak planlanacak projeler için fon ihtiyacı artacaktır. İhtiyaç duyulan bu fonların kaynağı olarak bankalar görülmektedir. Bu projeler için yüklü miktarlarda banka kredisi gerekecektir. Öte yandan iklim değişikliğini tetikleyecek etkilere sahip şirketlere ve projelere verilen krediler ise cezalandırılacaktır. Böylelikle bankaların kredi portföy yapısı değiştirilmek zorunda kalacaktır. Ancak dünya genelinde halen kamu finansmanına bağımlı olan yeşil projelerin başarısı ve karlılığı belirsizliğini sürdürmektedir. Bu belirsizlik dikkate alındığında, yaşanan bu sürecin bankacılık sektörü ve finansal istikrar üzerinde etkileri olacağı aşikardır. Yeşil kredilerin geleneksel kredilere göre daha yüksek risk taşıma olasılığı ve daha düşük karlılık getirme durumu, ülkeler için iklim değişikliği ile mücadele konusunda zorluk taşıyabilmektedir (Galan ve Tan 2022). IPCC raporuna (2022) göre iklim değişikliğinin doğal sistemi bozduğu belirtilmiş ve dolayısıyla bu olumsuz gelişmenin insani sistemin üzerinde de negatif etkileri olduğu bildirilmiştir. Geçmişte gerçekleştirilen eğilimler ve mevcut kalkınma eğilimleri küresel iklim değişikliğine yönelik dirençli kalkınmayı sürdürmediği görülmüştür. Gelecek on yıl içinde uygulamaya konulacak toplumsal tercihler ve eylemler, orta ve uzun vadeli yolların ne ölçüde daha yüksek veya daha düşük iklim dirençli kalkınma sağlayacağını gösterecektir. Bununla birlikte, mevcut sera gazı emisyonları hızlı bir şekilde düşüş göstermezse, yakın süreçte özellikle 1,5°C'lik küresel ısınma aşılırsa, iklim değişikliğine dirençli kalkınma beklentileri giderek sınırlanacaktır (IPCC, 2022). İklim değişikliğinin etkileri giderek daha belirgin hale gelirken, karbondan arındırmanın acil bir hal aldığı ortaya konmuştur. Bu bağlamda karbondan arındırmanın finansal istikrarı nasıl etkileyebileceği sorularını da tekrar gündeme getirmiştir (Daumas, 2023).

İklim değişikliğinin en önemli unsurundan biri olan karbon ayak izi, iklimle mücadele konusunda en önemli göstergelerden biridir. Karbon ayak izi, bir kişinin veya şirketin, atmosfere saldırdığı karbon dioksit ve sera gazının miktarıdır. Salınan bu gazlar atmosfer ortamında birikerek sıcaklığı artırmaktadır. Gezegendeki artan bu sıcaklıkla birlikte iklim değişikliği meydana gelmektedir. Karbon ayak izi ölçümü genel olarak metrik ton CO₂ eşdeğeri cinsinden ölçülmektedir. Bu hesaplamalar insan aktivitelerinin bir sonucu olarak, bir birey açısından günlük yaşam şeklini yansıtırken; bir şirket için üretim aşamalarını, ülke için enerji üretimini barındırabilir. İklim değişikliği ile mücadele ülke ekonomileri için büyük risk taşımaktadır. İklim değişikliğinin, ekonomilerin sahip oldukları kaynakların kullanılabilirlik sürecini etkileyerek enerji fiyatlarını ve doğrusal olarak şirketlerin piyasa değerini etkileyeceği öngörülmektedir. Üretim aşamalarında farklı derecelerde karbon salınımları gerçekleştiren şirketler, ihtiyaçları olan fonların büyük kısmını bankalardan karşılarlar. Özellikle bankalar kullandıkları kredileri, farklı derecelerde karbon yoğunluğuna sahip

sektörlere finansman olarak sunmaktadır. Banka kredilerinin ayak izi, kredi portföyünün karbon yoğunluğunun açıklanmasına katkıda bulunmaktadır (IMF, Carbon Footprint of Bank Loans, 2024).

2. LİTERATÜR TARAMASI

GM (1,1) yöntemi literatürde tercih edilen yöntemlerden biri olmakla birlikte birçok alanda uygulanmaktadır. Zhao vd., 2022, küresel olarak artan finansal risklerin, yeşil büyümenin kısıtlanmasında önemli bir rol oynadığını vurgulamıştır ve bu ilişki özellikle finansal risklerin yüksek olduğu ve çevre dostu olmayan ülkelerde daha belirgin olduğu saptanmıştır. Xiang vd., (2023), bankacılık sektöründeki rekabetlerin karbon emisyon seviyelerini artıracağını belirtirken; bunun tersine Kim ve ark. (2020) finansal sistemin gelişmesi üzerine yapılan reformların, çevre kalitesine olumlu yönde katkı sağladığını belirtmiştir. Aloui vd. (2023), Sahra altı Afrika ülkelerindeki araştırmasında olumsuz çevresel değişikliğinin, bankacılık sektörü istikrarını zayıflatıldığını ve sistemik bankacılık krizi olasılığını artırdığını belirtmiştir. Yin vd, (2021), Çin bankacılık sektöründe yeşil kredi, banka performansı ve banka riski arasındaki karşılıklı ilişkileri araştırmıştır ve yeşil kredilerin Çin'deki banka kârlılığını artırdığını tespit etmiştir. Bayrak (2022), Euro bölgesi özelinde bankacılık sektörü faaliyetlerinin çevresel etki doğurduğunu ortaya koymuştur. Buna göre, bankaların şube ve ATM sayılarında yaşanan artışın yanı sıra kullanılan her kredinin CO₂ emisyonunu artırdığı belirlenmiştir. Özen ve Yıldırım (2023), Türkiye'de dijital bankacılık kullanımı ile sera gazı emisyonu arasındaki ilişkiyi inceledikleri çalışmada iki değişken arası anlamlı ilişki tespit etmiştir. Buna göre, bankacılıkta dijitalleşme sürecinde ilk olarak sera gazı emisyonunu artırıcı etki görülse de, zaman içerisinde dijital bankacılık kullanımının yaygınlaşması sera gazı emisyonunu azaltıcı etki doğurmaktadır. Susanti vd. (2020), ASEAN ülkelerini 1990-2016 dönemi için incelemektedir. Bulgular, banka şube sayısı ve banka mevduatlarının CO₂ gazı salınımını artırıcı etkiye sahip olduğunu ortaya koymaktadır. Öte yandan ATM sayılarının benzer bir etkiye yol açmadığı tespit edilmiştir. Tatar ve Çeştepe (2024), çalışmalarında 1995-2019 dönemine ait Türkiye verilerini incelemektedir. Elde edilen bulgular, finansal gelişmişlik ve ekonomik büyümenin karbon emisyonunu artırdığını göstermektedir. Jiang ve Ma (2019), aralarında gelişmiş ülkeler ve gelişmekte olan ülkelerin bulunduğu 155 ülkeyi inceledikleri çalışmada benzer şekilde finansal gelişmişliğin karbon emisyonu miktarını artırdığını ortaya koymuştur. Öte yandan, Tamazian vd. (2009), BRIC ülkelerini inceledikleri çalışmada finansal gelişmişliğin, CO₂ salınımını ve dolayısıyla çevresel bozulmayı azaltıldığını ortaya koymuştur. Stolbov ve Shchepeleva (2023), çalışmalarında banka kredileri ile karbon ayak izi arasındaki ilişkiyi 37 farklı ülke verisi ile incelemektedir. Bulgular, sistemik riskin, kredilerin karbon ayak izini artırdığını göstermektedir.

3. MATERYAL VE METOT

Gri sistem teorisinin en temel modellerinden biri GM (1,1) modelidir. Analizde GM (1,1) modeli kullanılmıştır. Gri sistem teorisinin ve GM (1,1) modelinin detaylı açıklaması aşağıda verilmiştir.

3.1.Gri Teori

Gri Teori, 1980 yıllarında ortaya atılan bilimsel bir teoridir ve Julong Deng tarafından formüle edilmiştir (Liu vd., 2012). Gri sistem teorisi, rastgele seçilen tüm örnek çeşitlerinin belirli bir aralıkta değişen gri çeşitler olarak tanımlanmaktadır (Shen ve Lu, 2014). Gri sistem teorisinde bilinen ya da belirsiz bilgiler ile veri üretme yaklaşımı doğrultusunda, ham veriler düzenli bir üretici seriye dönüştürülebilmektedir. Ardından elde edilen verileri kullanarak araştırma ve modelleme yapılabilmektedir (Shen ve Lu, 2014).

Teori başarılı uygulamaları ile Gri Sistem kavramı olarak Çin'de iyi bilinmektedir. Gri Sistemin uygulama alanları ise; tarım, ekoloji, ekonomi, meteoroloji, tıp, tarih, coğrafya, sanayi, deprem, jeoloji, hidroloji, sulama stratejisi, askeri işler, spor, trafik, yönetim, malzeme bilimi, çevre, biyolojik koruma vb. (Julong, 1989).

3.1.1.Gri Tahmin Yöntemi

Gri tahmin yöntemi, sistemin söz konusu olan gelecek dönemleri hakkında tahmin üretebilmesidir. Sistemin belirsiz özelliklerini anlayabilmek üzere ham veri setleri kullanılarak tahmin yapılmaktadır (Liu ve Lin, 2010). Gri tahmin teorisi, gri sistem teorisinin önemli bir dalıdır. Gri tahmin beş ana kategoriye kapsamaktadır. Zaman serileri, afet, mevsimsel afet, topolojik ve sistematik tahmindir (Xie ve Liu, 2009). GM (1,1) modeli, Gri Sistem Teorisi'nin en önemli modellerindendir (Yuan ve Chen, 2016). Aynı zamanda GM (1,1) modeli, tahmin teorisinin öncü modelidir. GM (1,1) modeli en az dört veri ile oluşturulan ve yüksek hassasiyetli sonuçlar sunan tek değişken birinci dereceden gri modeldir (Xie ve Liu, 2009).

GM (1,1) Modeli

GM (1,1) metodu, birinci dereceden tek değişkenli gri modelidir. Temel GM (1,1) modelinin adımları aşağıdaki gibidir;(Xie ve Liu, 2009,; Liu ve Lin,2010).

- Ham veri seti oluşturulur ve $X^{(0)}$ negatif değerler içermeyen orijinal veri serisidir.

$$X^{(0)} = (x^{(0)}(1), x^{(0)}(2), \dots, x^{(0)}(n))$$

- 1. dereceden toplam üretim operatörü yardımıyla $X^{(1)}$ serisi oluşturulur.

$X^{(1)} = (x^{(1)}(1), x^{(1)}(2), \dots, x^{(1)}(n))$, $X^{(1)}$ serisinin ardından

$X^{(0)}k + ax^{(1)}(k) = b$ eşitliği elde edilir. Eşitlik GM (1,1) modelinin orijinal biçimi olarak bilinir.

- $X^{(1)}$ serisi kullanılarak $Z^{(1)}$ serisi oluşturulur.

$$Z^{(1)}(k) = \frac{1}{2}(x^{(1)}(k) + x^{(1)} + (k-1)) \quad k = 2, 3, \dots, n.$$

$Z^{(1)}$ serisi kullanılarak; $x^{(0)}k + az^{(1)}(k) = b$ elde edilir ve GM (1,1) modelinin temel biçimi oluşturulur.

- $X^{(1)}$ ve $Z^{(1)}$ serileri elde edildikten sonra eğer $\hat{a} = (a, b)^T$ parametrelerinin bir dizilimiye ve

$$Y = \begin{bmatrix} x^{(0)}(2) \\ x^{(0)}(3) \\ \vdots \\ x^{(0)}(n) \end{bmatrix} \quad B = \begin{bmatrix} -z^{(1)}(2) & 1 \\ -z^{(1)}(3) & 1 \\ \vdots & \vdots \\ -z^{(1)}(n) & 1 \end{bmatrix}$$

ise en küçük kareler yöntemi ile tahmin etmek için daha önce elde edilen $x^{(0)}k + az^{(1)}(k) = b$ eşitliği kullanılarak

GM(1,1)' in parametrelerine karşılık gelen $\hat{a}$ vektörü elde edilir.

$$\hat{a} = (a, b)^T;$$

$$\hat{a} = (B^T B)^{-1} B^T Y$$

- Eğer $(a, b)^T = (B^T B)^{-1} B^T Y$,

$$\frac{dx^{(1)}}{dt} + ax^{(1)} = b$$

ile 1. dereceden türevlenebilir eşitlik elde edilir;

$$x^{(1)}(t) = \left(x^{(1)}(1) - \frac{b}{a} \right) e^{-at} + \frac{b}{a}$$

Yani;

$$\hat{x}^{(1)}(k+1) = \left(x^{(0)}(1) - \frac{b}{a} \right) e^{-ak} + \frac{b}{a} \quad k=1, 2, 3, \dots, n$$

- Elde edilen 1. dereceden türevlenebilir eşitliğe ters kümülatif işlemi uygulanır. Tahmin değerleri aşağıda gösterilen model yardımı ile hesaplanır.

$$\hat{x}^{(0)}(k+1) = a^{(1)} \hat{x}^{(1)}(k+1) = \hat{x}^{(1)}(k+1) - \hat{x}^{(1)}(k) = (1 - e^a) \left(x^{(0)}(1) - \frac{b}{a} \right) e^{-ak}, \quad k=1, 2, \dots, n$$

- Tahmin değerleri için hata payı hesaplanır. Modelin gelecek tahmini için güvenilirliği test edilir. $X^{(0)}$ ham veri setinin herhangi bir k elemanı için tahmin hatası $\varepsilon^{(0)}(k)$ ile gösterilir. $\varepsilon^{(0)}(k)$ aşağıdaki denklem yardımı ile hesaplanır (Liu ve Lin, 2010).

$$\varepsilon^{(0)} = (\varepsilon(1), \varepsilon(2), \dots, \varepsilon(n)) = (x^{(0)}(1) - \hat{x}^{(0)}(1), x^{(0)}(2) - \hat{x}^{(0)}(2), \dots, x^{(0)}(n) - \hat{x}^{(0)}(n))$$

$X^{(0)}$ ham veri setinin herhangi bir k elemanı için hata oranı Δ_k ile gösterilmektedir. Hata oranı hesaplanarak yüzdesi alınır.

$$\Delta_k = \left(\left| \frac{\varepsilon(1)}{x^{(0)}(1)} \right|, \left| \frac{\varepsilon(2)}{x^{(0)}(2)} \right|, \dots, \left| \frac{\varepsilon(n)}{x^{(0)}(n)} \right| \right) = \{\Delta_k\}_1^n$$

$$\bar{\Delta} = \frac{1}{n} \sum_{k=1}^n \Delta_k$$

Oluşturulan modelin ortalama görelî hatası $\bar{\Delta}$ kullanılarak hesaplanır. Ardından modelin güvenirlîği test edilir. Tablo 1’de model testi doğruluk ölççeđi kullanılmaktadır.

Tablo 1. Model testi doğruluk ölççeđi

Doğruluk Ölçeđi	Eşik	Görelî Hata
	α	
1. seviye	0.01	
2.seviye	0.05	
3.seviye	0.10	
4.seviye	0.20	

Kaynak: Liu ve Lin, 2010

Hesaplanan değeri $\bar{\Delta} < \alpha$ ise gelecek tahmini yapılabilir. $1 - \bar{\Delta}$ ise modelin güvenirlîk oranını gösterir.

2.1. Uygulama

Çalışmada banka kredilerinin karbon ayak izi göstergesi kullanılmıştır. Banka Kredilerinin Karbon Ayak İzi göstergesi, belirli bir sektöre verilen yurt içi kredilerin karşılık gelen karbon emisyon faktörleriyle çarpılması, tüm sektörlerin toplanması ve nihai sonucun toplam yurt içi kredilere bölünmesiyle elde edilir (IMF, Climate Data, 2025). Analiz için 2012-2016 dönemine ait yıllık veriler kullanılmıştır. Veri seti aşağıda gösterildiđi gibidir.

	2012	2013	2014	2015	2016
$X^{(0)}$	79,393	76,05	84,071	100	115,37

$X^{(0)}$ dizisi ham veriyi temsil etmektedir. $X^{(0)}$ dizisinin kümülatif toplamı alınarak $X^{(1)}$ dizisi oluşturulmuştur.

$X^{(1)}$	79,393	155,443	239,514	339,514	454,884
-----------	--------	---------	---------	---------	---------

$X^{(0)}$ dizisi üzerinden yarı düzgünlük (quasi-smooth) kontrolü yapılır (Liu ve Lin, 2010),

$$p(4) = \frac{x_{(4)}^{(0)}}{x_{(3)}^{(1)}} \cong 0.41 \quad p(5) = \frac{x_{(5)}^{(0)}}{x_{(4)}^{(1)}} \cong 0.34$$

Yarı düzgünlük kontrolünde koşul; $k > 3$ olduđu durumlarda hesaplanan değeri 0,5’den küçük olma şartının sağlanması gerekmektedir. $p(4)$ ve $p(5) < 0.5$ koşulunu sağladığı için $X^{(0)}$ dizisi yarı düzgünlük şartını sağlar.

$X^{(1)}$ dizisi üzerinden ise yarı üssellik (quasi exponentiality) kontrolü yapılmıştır (Liu ve Lin, 2010).

$$\sigma^{(1)}(4) = \frac{x_{(4)}^{(1)}}{x_{(3)}^{(1)}} \cong 1.42 \quad \sigma^{(1)}(5) = \frac{x_{(5)}^{(1)}}{x_{(4)}^{(1)}} \cong 1.34$$

Yarı üssellik kontrolü için koşul: $k > 3$ olduđu durumlarda $\sigma^{(1)}(k) \in [1, 1.5]$ olmalıdır. $\sigma^{(1)}(4)$ ve $\sigma^{(1)}(5) \in [1, 1.5]$ olduğundan dolayı $X^{(1)}$ dizisi yarı üssellik kuralını sağlamaktadır.

GM (1,1) modeli kurulacaktır. Bunun için $X^{(1)}$ dizisi kullanılarak $Z^{(1)}$ dizisi oluşturulmuştur.

$Z^{(1)}$	79,393	117,418	197,4785	289,514	397,199
-----------	--------	---------	----------	---------	---------

$Z^{(1)}$ dizisinden sonra GM(1,1) parametreleri Y ve B oluşturulur.

$$Y = \begin{bmatrix} x^{(0)} & (2) \\ x^{(0)} & (3) \\ x^{(0)} & (4) \\ x^{(0)} & (5) \end{bmatrix} = \begin{bmatrix} 76.05 \\ 84.071 \\ 100 \\ 115.37 \end{bmatrix} \quad B = \begin{bmatrix} -z^{(1)}(2) & 1 \\ -z^{(1)}(3) & 1 \\ -z^{(1)}(4) & 1 \\ -z^{(1)}(5) & 1 \end{bmatrix} = \begin{bmatrix} 117.418 \\ 197.478 \\ 289.514 \\ 397.199 \end{bmatrix}$$

a ve b parametreleri ise aşağıda gösterildiği gibi hesaplanmıştır.

$$\hat{a} = (B^T B)^{-1} \cdot B^T Y = \begin{bmatrix} -0.144 \\ 57.751 \end{bmatrix}$$

a ve b parametreleri yardımı ile model kurulmuştur.

$$\frac{dx^{(1)}}{dt} - 0.144x^{(1)} = 57.751$$

$$\hat{x}^{(1)}(k+1) = 479.74e^{0.144k} - 400.35$$

Kurulan model ile tahmin değerleri hesaplanmıştır.

$\hat{x}^{(1)}$	$\hat{x}^{(1)}$	$\hat{x}^{(1)}$	$\hat{x}^{(1)}$	$\hat{x}^{(1)}$	$\hat{x}^{(1)}$
x	x (1)	x (2)	x (3)	x (4)	x (5)
$\hat{x}^{(1)}$					
x Tahmin Dizisi (Kümülatif)	79.393	153.838	239.834	339.176	453.932

Hesaplanan $\hat{x}^{(1)}$ tahmini kümülatif toplam değerlere, ters kümülatif işlemi uygulanarak tahmin değerleri elde edilmiştir. Değerler aşağıdaki gibidir.

$\hat{x}^{(0)}$	$\hat{x}^{(0)}$	$\hat{x}^{(0)}$	$\hat{x}^{(0)}$	$\hat{x}^{(0)}$	$\hat{x}^{(0)}$
x	x (1)	x (2)	x (3)	x (4)	x (5)
$\hat{x}^{(0)}$					
x Tahmin Dizisi	79.393	74.445	85.997	99.341	114.756

Ham veriler ve tahmini veriler kullanılarak göreceli hatalar hesaplanmıştır ve Tablo 2’de gösterilmiştir.

Tablo 2. Banka karbon ayak izi modeli için hesaplanan göreceli hata değerleri

	Ham veri	Tahmini Veri	Göreceli Hatalar %
	$x^{(0)}(k)$	$\hat{x}^{(0)}(k)$	$\Delta_k = \frac{ \varepsilon(k) }{x^{(0)}(k)}$
2013	76.050	74.445	2.111
2014	84.071	85.997	2.291
2015	100	99.341	0.659
2016	115.370	114.756	0.532

Göreceli hata verileri kullanılarak ortalama göreceli hata oranı elde edilmiştir.

$$\hat{\Delta} = 1/4 \sum_{k=2}^5 \Delta_k = 1.39\%$$

Modelin güvenilirliğinin test edilmesi için Tablo 1 kullanılarak elde edilen ortalama göreceli hata oranı, model testi doğruluk ölçeği ile karşılaştırılmıştır.

Modelin güvenilirliği için ortalama göreceli hata oranı, doğruluk test ölçeği ile karşılaştırılmıştır. Modelin ortalama göreceli

hata oranı %1.39, 2. Seviye (0.05) eşiğinin altında kaldığı için ($\hat{\Delta} < \alpha$) uygun aralıktadır. Kurulan modelin güvenilirliği sağlandığı için geleceğe ait tahminler yapılabilecektir.

Gelecek dönemler için tahmin değerleri Tablo 3’de gösterilmiştir.

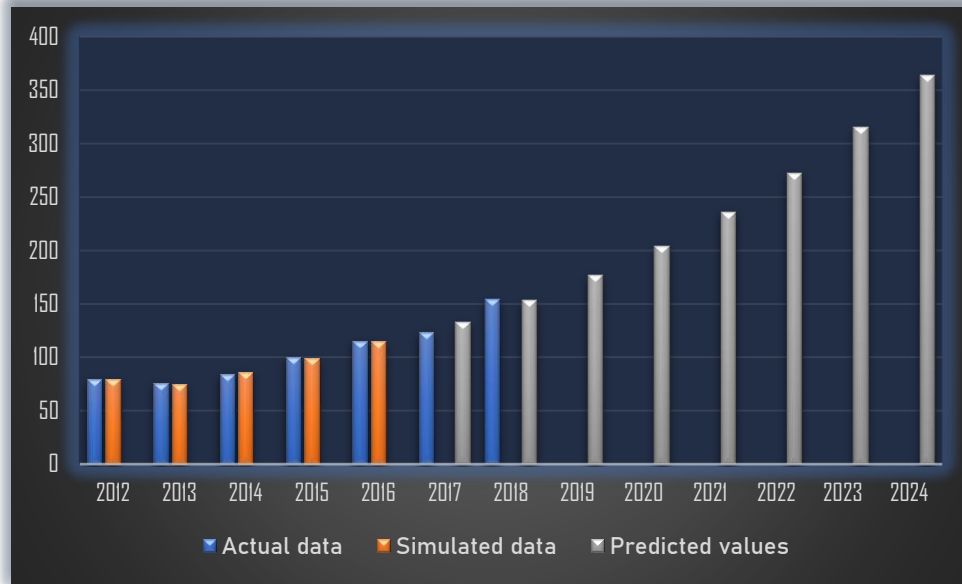
Tablo 3. Banka karbon ayak izi, tahmin değerleri ve gelecek dönem tahmin değerleri

	Ham veriler	Tahmin Değerleri
2012	79.393	79.393
2013	76.050	74.445
2014	84.071	85.997

2015	100	99.341
2016	115.370	114.756
2017	123.591	132.564
2018	154.484	153.134
2019		176.896
2020		204.346
2021		236.055
2022		272.685
2023		314.999
2024		363,879

Sonuçlara bakıldığında banka karbon ayak izi verilerinde her geçen gün artış yaşanacağı tespit edilmiştir. Elde edilen sonuçlarda ortalama %1,39 sapma olabileceği göz önünde bulundurularak; 2024 yılında banka karbon ayak izi 363,879 rakamlarına ulaşacağı öngörülmektedir. 2017/2018 yılları kontrol verileri için göreceli hata verileri kullanılarak ortalama göreceli hata oranı ise %4.06 olarak hesaplanmıştır.

$$\hat{\Delta} = 1/2 \sum_{k=1}^2 \Delta_k = 4.06\%$$



Grafik 1. Banka Karbon ayak izinin verileri, tahmin ve gelecek dönem tahmin değerleri

3. BULGULAR

Elde edilen bulgulara bakıldığında 2012-2016 yılı verileri kullanılarak oluşturulan model de göreceli hata payı % 1.39 çıkmıştır. Hata payının düşük çıkması ile kontrol verileri olarak 2017-2018 yılı tahminleri hesaplanmış ve gerçek değerleri ile karşılaştırılmıştır. 2017-2018'de gerçekleşen değer ile tahmin değerleri arasında ortalama göreceli hata payının ise % 4.06 olduğu görülmektedir. 2024 yılına kadar yapılan tahmin değerlerine bakıldığında ise karbon ayak izi verilerinin artış gösterdiği tespit edilmiştir. Bulgularda Grafik 1'de de görüldüğü üzere bankaların karbon ayak izi değerlerinde her geçen gün artış yaşanacağı öngörülmektedir.

4. TARTIŞMA VE SONUÇLAR

Sonuçlar ülkenin finansal kurumları için sürdürülebilir ve iklim değişikliği ile mücadele konusunda bir fikir sunmaktadır. Bulgular aynı zamanda devam eden ve her geçen gün artan karbon ayak izine dikkat çekmektedir. Bu bağlamda İklim değişikliği ile mücadele için ekonomi alanında yeni politika senaryolarına ihtiyaç vardır. Elde edilen bulgular, genel finansal istikrarın korunmasının, yeşil kredinin dünya çapındaki rolünün artırılması ve daha yüksek seviyelerde çevresel sürdürülebilirliğe geçiş için farkındalık yaratacak ve yol göstermesine katkı sağlayacaktır. Aynı zamanda çevresel sürdürülebilirliğe geçiş için özellikle finansal kurumların bu alandaki projelere daha fazla yer vermesinin gerekliliği önem arz etmektedir.

Stolbov ve Shchepeleva (2023), karbon ayak izinin sistemik riskten etkilendiği belirtmiştir. Bu durum karşısında da yeni politikalar üretilmesi gerekliliği de doğmaktadır. Finans alanında yapılacak sürdürülebilir yeşil kredi uygulamaları Yin

vd. (2021), çalışmalarında belirttikleri gibi banka kârlılığını artırdığını belirtmiştir. Finansal kurumların bu bağlamda yeni bir karlılık projeleri için çalışmasına da ön ayak olabilecektir. Bankacılık faaliyetlerinin Susanti vd. (2020), de ortaya koyduğu gibi CO₂ gazı salınımını artırıcı etkiye sahip olduğunu belirtilmiştir. Tatar ve Çeştepe (2024) ve Jiang ve Ma (2019) gelişmişlik ve ekonomik büyümenin karbon emisyonunu artırdığını, öte yandan, Tamazian vd. (2009), ise finansal gelişmişliğin, CO₂ salınımını ve dolayısıyla çevresel bozulmayı azalttığını ortaya koymuştur. Ülkelerin gelişmişlik düzeyleri boyutunda incelendiğinde sonuçlar farklılık gösterse de her geçen gün banka karbon ayak izinin arttığı bulgularımızda elde edilmiştir. Bu nedenle finansal kurumların çevresel boyutta çabalamaları ve sürdürülebilir yeşil bir dünya için yeniliklere açık olmaları gerekmektedir. Bu konuda yapılacak proje uygulamaları ve azaltıcı senaryoların gerekliliği, yeni politikaların uygulanması adına çalışmamızın finansal kuruluşlara ışık tutması beklenmektedir. Elde edilen sonuçların Türkiye'deki bankaların yeşil bankacılık uygulamalarına daha da dikkat çekmesi gerektiğini gösterirken; sınırlı veri ile yapılan bu gözlemler, ilerleyen süreçte yapılacak çalışmalara öncülük etmesi beklenmektedir.

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Conflict of Interest / Çıkar Çatışması

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Street Harassment's Impact Women's Sense of Safety and Autonomy in Public Spaces in Istanbul

RANA ZEYNEP UYSAL

Abstract: This study explores the impact of street harassment on women's sense of safety and autonomy in public spaces in Istanbul. The research, which is based on a series of semi-structured interviews with women aged between 18 and 45, reveals that harassment has a significant impact on the daily routines, psychological well-being and social participation of women. Thematic analysis identified three primary themes: alterations to daily habits for safety, the tendency to blame women for harassment, and potential strategies for societal change. The participants reported a variety of behaviors they adopt in order to avoid potential risks, including avoiding being alone, modifying their travel times, and limiting their movement in public spaces due to fear. Furthermore, many participants expressed feelings of internalized blame and societal pressure to remain silent. The findings emphasize the pivotal role of empathy, education, and family-based awareness in mitigating gender-based harassment. The study emphasizes how street harassment, as a form of gender-based violence, undermines women's freedom and reinforces structural inequalities in urban life. The study calls for collective and institutional efforts to foster safer public environments by contextualizing these experiences within broader social dynamics. The study's findings contribute to a more nuanced understanding of how pervasive harassment can constrain women's autonomy and underscore the necessity for cultural and educational interventions to address gender-based street violence.

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STREET HARASSMENT'S IMPACT WOMEN'S SENSE OF SAFETY AND AUTONOMY IN PUBLIC SPACES IN İSTANBUL

Street harassment is becoming a significant problem in big cities. This situation, which is increasingly becoming a social problem in big cities like Istanbul, has different consequences for every woman. Although it varies from woman to woman, there are some common feelings for women: fear, insecurity, loss of freedom. These common psychological effects are found in most women, if not all women. This widespread situation in Istanbul is of interest to women in terms of how they behave in public spaces and to what extent it shapes their perception of freedom. It examines the problems of safety and autonomy that women in Istanbul feel due to street harassment. It observes the social and psychological effects that most women encounter in their daily lives. The research question is: How does street harassment affect women's sense of safety and autonomy in public spaces in Istanbul?

Women changing their daily routines because they feel unsafe is one example of gender inequality. Bastomski and Smith (2016) state that women change their daily lives and avoid certain environments in order to avoid harassment, and this is evidence of how little and limited the freedom women have been. Similarly, Fairchild (2023) states that experiences such as street harassment not only affect women's physical movements, but also negatively affect both their emotions and the sense of security they feel. In addition, according to Yılmaz (2019), factors such as the places where women are, their clothing and behavior shape the blaming behavior towards women. In other words, men discriminate according to women's behavior and blame women after harassing them. Kearl (2010) states that women who are accused of street harassment, as mentioned by Yılmaz, are actual increasingly pushed to the background in the public sphere, meaning that women restrict themselves. Kenworthy (2022) mentioned that training programs can be organized for social awareness. In addition, Yılmaz (2019) advocates not only trusting legal authorities in terms of protecting women's rights but also argues that social support for women should be increased. Kearl (2010) and Kenworthy (2022), who argue that harassment can be combated, state that there is a need for change in society and that this is not an individual but a social, that is, structural, change.

METHODOLOGY

RESEARCH DESIGN

The studies investigated how street harassment experienced by women in public spaces affected their sense of safety and autonomy. In an interview where participants could express their personal views and reflect on what they felt, information was collected on how this affected their daily lives. The subject of the research is how women exist in social life and how they feel about themselves based on their experiences. The important thing is to create a friendly environment where they can freely express their personal views. It reveals how they take precautions against street harassment and how this

gender-based harassment makes them cautious. The interview method allowed participants to share their experiences and knowledge. Participants were assigned to women between the ages of 18-45. This age group was examined because women in this age group are most likely to be harassed on the street. It was planned to select people from different situations from this group and interview 3 people, and they were interviewed. The participants were diversified with people from different socioeconomic statuses. Participants were carefully selected through social media platforms and university networks. This method was used to ensure diversity of participants in terms of gender and socioeconomic status. The first interview with these people lasted 23 minutes, the second interview lasted 20 minutes and finally the third interview lasted 33 minutes. In addition, the interview dates were 04.12.2024, 06.12.2024 and 08.12.2024. The interviews with three people were later converted into transcripts.

PARTICIPANTS

The participants were women between the ages of 18-45. This age group is somehow open to external influences and represents a psychologically sensitive period. It is also seen that this age group experiences street harassment the most and therefore develops many strategies. Some women between the ages of 18-45 are an age group that has not yet fully developed social awareness and is just starting to recognize itself with security concerns. The participants were carefully selected through social media platforms. Announcements were made on social media networks and people who fit the criteria were found thanks to the announcements. The only demographic criterion of the participants was their age. The only residence criterion was that they were in Istanbul. This method further diversified the participants in terms of their socioeconomic status and helped understand how street harassment changes in different social lives. People in different situations were selected from this age group and 3 people were interviewed.

DATA ANALYSIS

All interviews were audio-recorded (with the participant's consent) and transcribed verbatim for analysis. Data were analyzed using thematic analysis, a qualitative method that involves identifying and coding recurring themes in the data.

RESULTS

Overall, three relevant themes were obtained from the interviews: Changing daily routine for safety, blaming women for harassment, strategies for change.

CHANGING DAILY ROUTINE FOR SAFETY

The first theme is daily routines that most women change for safety reasons, such as not being alone and not staying up late at night. This change is not something they do willingly, they do not go out at night because they are afraid of being disturbed, especially when they are alone. All interviewees said that they are worried when going out and are often afraid of experiencing harassment. The first participant said: "I am much more afraid if I encounter something because I know I am alone, so I started not to go out alone" (personal communication ,04.12.2024). Then she said that "I was shocked by the person I have become; I can no longer even go out alone because of fear" (personal communication, 04.12.2024). The second participant said: "I have a life that is owned by fear" (personal communication, 06.12.2024). She added: "I try to go early because I'm a little nervous because I go there alone." What she's talking about here is that she moves her working hours to earlier. The third participant said about the harassment she experienced during the walk that she was alone, and she was afraid to be alone. Because she was affected by this incident, she said that even when she meets her friends, she must adjust the clock because she cannot walk on the street late and should not return home late.

BLAMING WOMEN FOR HARASSMENT

The second theme talks about blaming women for the harassment they experience. Most women say that they are harassed on the street but are hesitant to tell because they will blame the woman. The common thought of all interviewees is that women tend to blame themselves for the harassment they experience and that the reason why people who are harassed feel ashamed is because they think it is only happening to them. The first participant said: "I think no one should think that it is their fault, and no one should feel ashamed when telling" (personal communication, 04.12.2024). On the contrary, they should not feel ashamed and tell everyone because when such problems are hidden, we cannot understand that everyone is also there. She thinks that this is not a situation that should be hidden, on the contrary, the more it is told, the more awareness is raised. The third respondent said that: "I wagged my tail at him, and I left him in the lust today, and this only meant one thing, which was sexual desire" (personal communication,08.12.2024). In this case, the person who harasses the woman tries to justify himself by saying that there is an expectation from her and then wagging her tail because she did not approve. The expression wagging her tail is used, meaning that she did not respond to his sexual desire in the same way, that is, the woman did approve because she did not want it.

STRATEGIES FOR CHANGE

This theme emphasizes how society can be changed and emphasizes that changing society is influenced by factors such as social awareness and empathy. The second participant said: "They don't even think about what women think, I wish they would. It's a situation that stems from no one thinking about what each other thinks." (personal communication, 06.12.2024). It stems from most men not being able to empathize. The first participant said that: "What needs to be changed is the stereotyped ideas in society." (personal communication, 04.12.2024). The idea to be derived from this is that people in society start changing their thoughts. A more comfortable and prosperous society is created with broken thought patterns. The second participant said that: "Everyone can reduce these harassment incidents by warning their own children." (personal communication, 06.12.2024). In this case, people need to raise awareness in their own environment, starting with their own environment. Such problems will begin to decrease in a society that is more conscious. The third participant states that change in society is not easy and that there is a problem in raising boys.

DISCUSSION

This study addresses the security problem experienced by women due to street harassment. This study is divided into 3 categories. The first category is women changing their routines for their own safety. The second category is women accusing women of harassment. The third category talks about change strategies. In parallel with the results of this study, Kenworthy (2022) stated that a man he does not know asking a woman for her number and name and insisting on being rejected can lead to sexual harassment. Although they do not share the same idea as Kenworthy, Kears (2010), who shares the same thought system, states that women's sense of security is damaged every day when men think that they have an unwanted advantage and can do whatever they want to women. As indicated previously, women change their daily routines to escape this feeling of insecurity. For example, Bastonski and Smith (2017) mention that street harassment affects women's lives in many ways, including changing their daily routines. Many women reshape their daily activities by avoiding areas that pose a risk of harassment. For example, some interviewees mentioned above, women may avoid going out alone in the evening, choose to drive instead of walking instead of using public transport, or choose safer routes when walking alone. As a result from these findings, street harassment causes changes in every aspect of women's lives due to their security concerns, both physically and psychologically, and this situation negatively affects women's daily lives, time management and social participation.

Another point that is mentioned is that women are blamed even though they are victims, that is, they are blamed even if the party being harassed is a woman. There is a belief that they are guilty because they are women. Fairchild (2023) talks about how women are always blamed even though they are victims in cases of harassment. In addition, there is a situation where women are harassed regardless of how they dress or the environment they are in, and women who are uncovered dress revealingly to give them permission. Especially women dressing revealingly leads to the legitimization of harassment or the idea that women "want" to be harassed. However, this approach is nothing more than putting the blame on the victim by citing harassment incidents as an excuse. Regardless of the way women dress or the environment they are in, the responsibility for harassment always belongs to the person who is harassing. In this context, the way women dress or the environment they are in outside are not excuses for harassment, but only factors that strengthen sexist and misunderstandings. Kears (2010) talks about men who think they can do whatever they want to women because there are men who think they can do whatever they want to women; Fairchild (2023) talks about men who justify themselves by blaming the female victim. One of the reasons for street harassment is lack of education or men not living in a society where there is not enough empathy.

An additional significant aspect to consider, as mentioned above, is that it is emphasized that the problems in society can be eliminated by starting with education received from the family, and Yılmaz (2019) states that violence is a learned behavior. He states that violence is not innate, but a behavior acquired over time in the social sphere. This learning process may result from a lack of empathy, and in addition, respect for individual barriers established in society is not formed. Violating the boundaries of emotional and physical barriers established for others leads to a lack of empathy. These feelings that are ignored make it easier for the person who commits street harassment to see the rights of others as unimportant. As a result, one of the most important reasons underlying phenomena such as street harassment is men's lack of empathy and lack of social education. It should be explained that violence is unacceptable in schools, workplaces and society, starting from the family, and a society based on healthy relationships and respect should be built.

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It should be written as short as possible and expressing the contribution made without giving the number.

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Interview Questions

- 1-Başlangıç olarak mesleğinizden, yaşınızdan, işinizden bahseder misiniz?
- 2-Kaç yıldır bu işte profesyonelsiniz?
- 3-İş hayatına girdikten sonra sokağa çıkma alışkanlıklarınız değişti mi?
- 4- Neden değiştirmek zorunda kaldınız?
- 5- Ne şekilde değişti? Biraz açar mısınız?
- 6- Bu değişime neden olan faktörler nelerdi?
- 7- Bu faktörlerden sizi en güvende hissettirmeyeni nedir?
- 8- Yalnız dışarı çıkmak size güvensiz hissettiriyorsa o zaman hiç yalnız çıkmaktan tereddüt edip arkadaşlarınızla çıkmayı tercih ettiğiniz oldu mu?
- 9- Kadın olarak sokakta güvensiz hissediyor musun sorusuna ne derdin?
- 10- Böyle düşünmene neden olacak yaşadığın bir örnek var mıdır? Varsa anlatabilir misin?
- 11- Eğitimci olarak öğrencilerinizi bilinçlendirmek için yapacağınız veya yaptığınız belli şeyler var mıdır?
- 12- Bir kişinin bile bakış açısını değiştirecek olsanız bu toplumdaki sıkıntıyı nasıl aza indirir sizce? Yani aza indirmek için ne yapılır?
- 13- Burada kadını suçlayıcı bir bakış açısı olsaydı peki ne düşünürdünüz?
- 14-Sizce öğretmenlik mesleği bu sorunun kaynağına değinebilir mi?
- 15- Neden iş hayatına girince dışarı çıkma saatleriniz değişti?
- 16- Kadınların sokaklarda güvensiz hissettiğini ve ona göre günlük rutinlerini oluşturdıklarını söylesem katılır mıydınız bana?
- 17- Kadınların sokakta taciz edildiğinde kadınları suçlayan düşünce yaygın mıdır sizce?
- 18- Kadınların arkasından yüz verdi gibi söylemleri olması hakkında ne düşünüyorsunuz?
- 19- Peki ya bu tip düşüncelerin değişmesi için sizce neler yapılabilir?
- 20- Bu tip deneyimlerin uzun vadede ruh halini veya güvenlik duygunu nasıl etkilediğini söyleyebilir misin?
- 21- Sence bu bireysel bir sıkıntıdan mı kaynaklanıyor yoksa toplumsal bir sıkıntı mı?
- 22- O zaman sence bu toplumsal sıkıntı nasıl değiştirilebilir? Ne düşünüyorsunuz?

Developmental State Approach And Country Examples

HİDAYET GİZEM ÜNLÜ ÖREN*¹

Abstract: Developmental state approach or liberal economic policies? The origin of this question actually goes back to the debate on Classical economic policies or Keynesian economic policies. However, the subject of this study is not to get involved in these discussions but to examine the developmental state approach and country examples and to determine the common economic policies of these countries. In this way, it is aimed to shed light on other countries that want to develop. The scope of the study consists of Japan, the first of the newly industrialized (late developing) countries, followed by South Korea, Taiwan, Singapore and Hong Kong, which are described as the Southeast Asian miracle that achieved great growth momentum in the 1990s, then Malaysia and China, which has grown with very high growth rates in the last twenty years. As a result of the study, the common characteristics of the countries that implement the developmental state approach are determined as the implementation of an export-based growth strategy, state support for certain industries and sectors, state support for infrastructure and transportation, investment in education and close cooperation between the public and private sectors.

Keywords: Development, Developmental State, Economic Growth

Özet: Kalkınmacı devlet yaklaşımı mı liberal iktisat politikaları mı? Bu sorunun kökeni aslında Klasik iktisat politikaları mı Keynesyen iktisat politikaları mı tartışmasına kadar uzanmaktadır. Bununla birlikte bu çalışmanın konusu bu tartışmalara dahil olmak değil kalkınmacı devlet yaklaşımını ve ülke örneklerini incelemek ve bu ülkelerin ortak ekonomi politikalarını belirlemektir. Böylelikle kalkınmak isteyen diğer ülkelere ışık tutmak hedeflenmektedir. Çalışmanın kapsamını yeni sanayileşen (geç kalkınan) ülkelerin ilki olan Japonya, ardından 1990'lı yıllarda büyük bir büyüme ivmesi yakalayan Güney doğu Asya mucizesi olarak nitelendirilen Güney Kore, Tayvan, Singapur ve Hong Kong, ardından Malezya ve son yirmi yıldır çok yüksek büyüme oranları ile büyüyen Çin oluşturmaktadır. Çalışmada sonucunda kalkınmacı devlet yaklaşımı uygulayan ülkelerin ortak özellikleri olarak ihracata dayalı büyüme stratejisi uygulanması, belirli endüstrilerin ve sektörlerin devlet tarafından desteklemesi, altyapı ve ulaşım konusunda devletin destek sağlaması, eğitime yatırım yapılması ve kamu ile özel sektör arasındaki yakın işbirliği belirlenmiştir.

Anahtar Kelimeler: Kalkınma, Kalkınmacı Devletler, Ekonomik büyüme

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1. GİRİŞ

Başlangıçta kalkınmacı devlet kavramı, II. Dünya Savaşından sonraki dönemde Japonya'nın hızlı modernizasyonunu ve ekonomik büyümesini tanımlamak için kullanılmıştır ve sanayileşmeyi teşvik etme konusunda hükümetin oynadığı öncü rolle ilişkilendirilmiştir. Kalkınma fikri, özellikle II. Dünya Savaşı'ndan sonra "az gelişmiş" olarak nitelendirilen ülkelerin gelişmesi için bir formül görevi görmüş ve uygulama alanı bulmuştur (Caldentey,2009:27). Bu noktada ekonomik kalkınma ve ekonomik büyüme terimlerine kısaca değinmek yerinde olacaktır. Çünkü ekonomik büyüme ve kalkınma dünya ekonomisinde yer alan her ülkenin gerçekleştirmek istediği temel hedeflerdir ancak bu iki kavram çoğu zaman birbirine karıştırılmaktadır. Ekonomik büyüme, genel olarak bir ülkenin üretim hacminde dönemlerle oluşan artış olarak tanımlanır. Ülke ekonomilerinin üretim hacimdeki artışı ölçmek için de Gayri Safi Yurt İçi Hasıla(GSYH) değerleri kullanılır (Özel,2012:64, Kaynak,2011:84). Buna ek olarak kişi başına reel gelirde oluşan devamlı artış da ekonomik büyüme olarak tanımlanmaktadır(Ünsal, 2016:11). Ekonomik kalkınma ise ekonomik büyümeyi de içine alan kapsamlı bir tanımdır. Ekonomik büyümeye ek olarak ülke ekonomisindeki işsizliğin azaltılması, gelir dengesizliklerinin giderilmesi, sosyo-kültürel göstergelerin iyileştirilmesi gibi unsurları da içermektedir.(Seyidoğlu,2006:829). Kısacası ekonomik büyüme, kalkınmanın ön koşulu, olmazsa olmaz ögesidir ancak tek başına kalkınma için yeterli değildir. Kalkınmanın başarılması ve ülke refah düzeyinin artması için ekonomik, sosyal ve kültürel unsurların bir bütün olarak iyileşmesi gerekmektedir.

Kalkınmacı devlet kavramı, aynı zamanda yirminci yüzyılın sonlarında Doğu Asya'da gerçekleşen devlet liderliğindeki makroekonomik planlama ile kalkınmanın başarılmasına atıfta bulunmak için kullanılmaktadır. Kalkınmacı devlet sadece kolektif ekonomik ve insani kalkınma ile ilgilenmez, aynı zamanda hükümetlerin ulusal kaynakları kullanma ve teşvikleri yönlendirmedeki temel rolü ile ilgilenir. Gümrük tarifesi koruması, sübvansiyonlar, ekonomik yardımlar ve ekonomik faaliyetin seçilmiş üretken sektörlerini geliştirmeyi amaçlayan diğer kontrol türlerini içeren bir dizi politikayı kapsar. (Caldentey,2009:27). Kalkınmacı devleti kavramsal çerçevede açıklayan ilk kişi Johnson'dır. Johnson (1982), kalkınmacı devleti ekonomik kalkınmaya yoğunlaşan ve bu amaca ulaşmak için gerekli politika önlemlerini yerine getiren bir devlet

olarak tanımlamıştır. En geniş tanımıyla Japonya, Çin, Singapur, Hindistan, Tayland, Tayvan, Vietnam, Malezya, Güney Kore, Filipinler ve Endonezya kalkınmacı devletler olarak kategorize edilmiştir (https://uliwiki.org/index.php?title=Kalk%C4%B1nmac%C4%B1_Devletler). Daha dar tanımlama da ise Doğu ve Güneydoğu Asya ülkelerinden Japonya, Güney Kore, Tayvan, Singapur ve Hong Kong kalkınmacı devlet olarak sınıflandırılmaktadır (Kaynak,2020:59). Doner, Ritchie ve Slater (2005), tarafından Güney Asya Ülkeleri Birliği'nin büyüekte olan ülkeleri Malezya, Tayland, Filipinler ve Endonezya'dan farklı olarak Güney Kore, Tayvan ve Singapur, "düşük değerli ekonomik faaliyetlerden daha yüksek değerli ekonomik faaliyetlere geçiş yapma" becerisini kazanmış ülkeler olarak gösterilmektedir (Kaynak,2020:66). Bu noktada belirtmek gerekir ki kalkınmacı devlet ve ilişkili politikalar sadece Japonya veya Doğu Asya ülkelerine özgü değildir ve Kalkınmacı devlet politikaları da yirminci yüzyılla sınırlı değildir. Avrupa ülkeleri on yedinci ve on sekizinci yüzyıllarda ve Amerika Birleşik Devletleri(ABD) de on dokuzuncu yüzyılda aynı politikaları kullanmıştır. Mevcut tarihsel kayıtlar, aslında kalkınmacı devletin ve onunla ilişkili politikaların farklı tarihsel zamanlarda, farklı koşullar altında ve farklı coğrafi konumlarda hükümet politikasının tekrarlayan bir özelliği olduğunu göstermektedir. (Caldentey, 2009:27,28). Bu çalışmada kalkınmacı devlet yaklaşımı ve ülke örnekleri incelenecektir. Çalışmanın kapsamını yeni sanayileşen (geç kalkınan) ülkelerin ilki olan Japonya, ardından 1990'lı yıllarda büyük bir büyüme ivmesi yakalayan Güney doğu Asya mucizesi olarak nitelendirilen Güney Kore, Tayvan, Singapur, Hong Kong ardından Malezya ve son yirmi yıldır çok yüksek büyüme oranları ile büyüyen Çin oluşturmaktadır.

2. Kalkınmacı Devlet Kavramı

Kalkınmacı devlet (developmental state) kavramı özellikle 1980'li yıllarda ortaya çıkmış (Johnson, 1982; Amsden, 1989), ardından 1990'lı yıllarda analitik açıdan geliştirilmiştir (Wade, 1990; Öniş, 1991; Rodrik, 1992; Evans, 1995). Kalkınmacı devlet terimi, ekonomik kalkınmanın yönüne ve hızına müdahale eden ve rehberlik eden bir devleti ifade etmektedir (Caldentey,2009:28). Kalkınmacı devlet, genel olarak devletlerin ülke ekonomilerinde ve kalkınma süreçlerinde aktif roller oynayabileceğini ve oynaması gerektiğini belirten bir bakış açısına sahiptir(Karaoğuz 2022:181). Kalkınmacı devlet yaklaşımı özellikle Japonya, Çin ve Güney Doğu Asya ülkelerinin (Güney Kore, Tayvan, Singapur ve Malezya) geç kalkınma başarıları ile yerini sağlamlaştırmış ve diğer gelişmekte olan ülkeler tarafından merakla takip edilmeye başlamıştır.

Kalkınmacı devlet kavramının kökenleri bir bakıma kalkınma iktisadı modellerinden Gerchenkron'un (1962) Geri Kalmışlığın önemi modeli ile bağlantılıdır. Gerchenkron modelinde Sanayileşme devrimini ilk uygulayan ve sanayileşen öncü ülkelerin olduğunu ancak daha sonradan sanayileşmeye çalışan ülkelerin de kendilerinden önce sanayileşen ülkelerin deneyimlerinden yararlanarak ve bunu avantaja çevirerek sanayileşmeyi ve kalkınmayı başarabileceklerini vurgulamaktadır. Geri kalmışlığın önemi modelinde, geç sanayileşen ülkeler kendinden önce sanayileşen ülkelerin deneyimlerine bakarak onları başarıya ulaştıran uygulamaları yapmalı, başarısız oldukları uygulamalardan kaçınmalıdır. Bunun başarılması noktasında devletin ve kurumların rolünün önemli olduğunu ve etkin rol oynaması gerektiğini belirtmektedir. Klasik kalkınmacı devlet paradigması, kalkınmaya geç kalan ülkelerin özel durumuna odaklanmış ve ekonomik dönüşümü ve yakalamayı önceliklerinin en üst sırasına koymuştur. Buna ek olarak geç kalkınan ülkeler açısından ekonomik büyümeyi maksimize etmeyi hedeflemiştir (Evans,2014:665, Ricz,2020:65). Başarılı kalkınmacı devlet örnekleri (geç sanayileşen ülkeler) olarak genellikle Japonya, Çin ve Güney Doğu Asya ülkeleri gösterilmektedir. Ayrıca Gerschenkron ve evrimci büyüme teorileri, geri kalmış ülkelerin teknolojik geri kalmışlığın avantajlarından fayda elde edebileceğini vurgulamaktadır. Söz konusu ülkeler küresel teknoloji yayılımından yararlanabilirler ve yeni bilgiye yapılan yatırımın maliyetlerine ve risklerine katlanmadan yeni teknolojilere ulaşım sağlayabilirler (Işık, 2016:17). On dokuzuncu yüzyılın sonlarında ekonomik gelişme döneminde(Rostow'un modelindeki kalkış aşamasını gerçekleştirme dönemidir bu dönem ABD için) ABD ekonomisinin hacminin iki katına çıkması yaklaşık 50 yıl sürmüştür. Benzer şekilde İngiltere'nin aynısını yapması yaklaşık 60 yıl sürmüştür. Günümüzde birçok Doğu ve Güneydoğu Asya ülkesi ise ekonomilerini her 10 yılda bir ikiye katlamaktadır ve Gerschenkron'un Geri kalmışlığın önemi modelini doğrulamaktadır. Başlangıçta, kalkınmacı devlet anlayışı, geç sanayileşen ülkelerin daha gelişmiş olan sanayileşmiş ülkeleri yakalamak için izlediği bir tür kalkınma stratejisi olarak kabul edilmiştir. Coates'e(2000:62) göre kalkınmış ülkeler karşısında kaybedilen zamanı telafi etmeye çalışan ülkelerde, devletin kendisinin sanayileşme hamlesine öncülük etmesi ve bu nedenle kalkınma işlevlerini üstlenmesi oldukça yaygın bir durumdur. Ancak Ha-Joon Chang (2002, 2008) ve Ormrod (2003) tarafından belirtildiği gibi, kalkınmacı devlet yaklaşımı ve politikaları, günümüzde sanayileşmiş olan ülkelerin erken kalkınma tarihinde de vardır (Caldentey,2009:31).

Örneğin günümüzde gelişmiş ülkeler sınıflandırmasında yer alan en gelişmiş ülkeler incelendiğinde erken kalkınmayı başarmalarında sanayi devrimine erken uyum sağlamalarının ve devletin de ekonomide bu süreci desteklemesinin bu sonuca ulaşmalarında etkin rol oynadığı görülmektedir. Bu noktada Chang'ın(2002) da vurguladığı gibi serbest piyasalar aracılığıyla geliştiği öne sürülen ülkelerin kalkınma süreçleri incelendiğinde devletten sürekli yardım alarak bulundukları konuma geldikleri görülmektedir. Şu iki örnek çok ilginçtir ki List'e göre ekonomiye devlet müdahalesini ve korumacılığı en mükemmel biçimde uygulayan ülke İngiltere'dir. Bairoch'a göre de modern korumacılığın en önemli uygulayıcısı ABD'dir (Chang 2002, Bairoch 1993, Kaynak,2020:61).

Kalkınmacı devlet, II. Dünya Savaşı'ndan sonraki dönemde Japonya ve Doğu Asya'da sanayileşmeyi teşvik etme konusunda devletin üstlendiği öncü rol ile bağdaştırılmaktadır. Söz konusu devletler, ekonomide seçilmiş üretken

sektörleri geliştirmeyi hedefleyen, sübvansiyonlar, tarife korumaları ve teşvikler gibi bir takım ekonomi politikaları uygulamıştır. Bu ülkelerdeki kalkınmacı devlet anlayışının temelini siyaset ve ekonomi arasında bir ittifakın kurulması oluşturmuştur. Bu durum, yeterli yetkilere sahip ve kalkınma çabalarını koordine eden uzmanlaşmış bürokratik bir yapının(kurumun) kurulmasıyla somut hale gelmiştir(Caldentey, 2009:27).

3. Kalkınmacı Devletin Özellikleri

Kalkınmacı bir devleti anlamak için, bu tür bir devletin bazı özelliklerini bilmek önemlidir (Thompson, 1996; Woo-Cumings, 1999). Kalkınmacı devletler genelde teknik eğitime çok önem verirler. Bu teknik eğitimin içine sayısal becerilerin ve bilgisayar becerilerinin geliştirilmesi önemlidir. Bu teknik odaklı eğitim, özellikle bürokrasi olmak üzere hükümet yapılarını güçlendirmek için kullanılır. Bu strateji sayesinde, siyasi ve bürokratik kademelerde, hükümet yapısı içinde her düzeydeki karar alma noktalarında sağlam bilimsel temellere dayalı, liderlik insiyatifi alabilecek, yeterli analiz araçlarına sahip, son derece eğitilmiş kişiler yer almaktadır. Ayrıca kalkınmacı devletlerin kaynakları verimli bir şekilde dağıttığı ve tahsis ettiği ve bu sayede eğitim gibi sanayileşmenin ve kalkınmanın temeli olan kilit alanlara en iyi şekilde yatırım yapabildiği de bilinmektedir. Kalkınmacı devletlerde başarının temel itici gücü sanayileşmedir. Sanayileşmenin amacı, yüksek katma değerli mal ve hizmetler üreten bir ülke yaratmaktır. Ülkelerin sundukları ürün ve hizmetlere toplam ekonomik değer katma süreci, doğrudan ülke ekonomisindeki sanayileşme düzeyine bağlıdır (Marwala,2006:1-4). Kalkınmacı devletin temelini oluşturan bazı temel özellikler vardır. Bunlardan birincisi, kalkınmacı devlet müdahaleci bir devlet olarak düşünülmektedir. İkincisi, kalkınmacı devlet, kamu mülkiyetini çok yoğun bir şekilde kullanmaz. Bunun yerine, kalkınmacı devlet, vergi indirimleri, sübvansiyonlar, ithalat kontrolleri, ihracat teşvikleri gibi bir dizi ekonomi politikası aracı ile hedeflerine ulaşmaya çalışır. Üçüncüsü, devlet müdahalesinin derecesi ve türü her ülkede kapsam ve içerik açısından zamanla değişir. Bu durum dış ve iç koşullara, devletin geliştirmeye çalıştığı endüstrinin(sektörün) yaşam döngüsüne bağlı olarak farklılık gösterebilir. Dördüncüsü, kalkınmacı devlet, planlı kalkınma sürecini uygulayabilmek için bürokratik bir kurumun varlığını gerektirir. Başka bir ifadeyle, kalkınmacı devlet, kalkınma sürecini denetlemek ve yönlendirmek için mutlaka bir pilot kurum gerektirir. Buna örnek olarak Japonya'nın Uluslararası Ticaret ve Sanayi Bakanlığı(MITI) veya Güney Kore'nin Ekonomik Planlama Kurulu kurumlarını gösterebiliriz. Son olarak, kalkınmacı devlet, özel sektörün devlet müdahalesine aktif katılımını gerektirmektedir.(Caldentey,2009:30).

4. Kalkınmacı Devlet Örnekleri

Bu çalışmanın kapsamını oluşturan ve tarihlerinin çeşitli noktalarında kalkınmacı devlet olarak kabul edilen ülke örnekleri aşağıda incelenmektedir.

4.1 Japonya: Çoğunlukla kalkınmacı devletin en eski örneklerinden biri olarak kabul edilen Japonya, II. Dünya Savaşı'ndan sonra Batılı kalkınmış ekonomilere yetişmeyi hedef olarak benimsemiş ve bu amaca uygun hareket ederek hızlı bir sanayileşme ve yüksek ivmeli bir ekonomik büyüme yaşamıştır. Söz konusu dönemde Japonya sonradan gelen (late-comers) ve geç kalkınan bir ülke olarak bazı avantajlardan yararlanmıştır. Bu çerçevede yeni teknolojileri başarılı bir şekilde öğrenmiş ve üretkenliğini hızlı bir biçimde artırmıştır. İhracat, Japon firmalarının hem ölçek ekonomilerine ulaşmasını sağlamış hem de teknolojik ilerleme ve etkinlik artışını sağlayarak bu firmalara uluslararası rekabet gücü kazandırmıştır. Bu unsurlar ekonomik büyümenin temelini oluşturmuştur (Akkemik, 2020:279).

Kalkınmacı devlet örneği genel olarak Japon ekonomik modeliyle tarif edilmektedir. Japonya, 1949 yılında kalkınmayı başarma hedefine ulaşabilmek için Uluslararası Ticaret ve Sanayi Bakanlığı'nı(MITI) kurmuştur. MITI başlangıçta, deflasyonist düzenlemeleri sınırlandıran "Endüstriyel Rasyonalizasyonla İlgili Politika"yı koordine etti. Ayrıca MITI'ye Yabancı Sermaye Yasası'nın onaylanması ile teknoloji ithalatı için fiyat ve koşulları müzakere etme yetkisi verildi. 1952 yılına gelindiğinde MITI, mal ithal etme haklarının ve döviz bütçesinin etkili kontrolünü ele geçirdi ve ekonomide daha da etkin hale geldi. Devlet, ilk başlarda yerli sanayinin korunması için bir ithalat kontrol sistemi uygulamıştır. Japonya'da döviz bütçesinin kontrolü, ihracat büyümesinin teşvik edilmesine ve desteklenmesine olanak yaratmıştır. MITI, Japonya Kalkınma Bankası'nın kurulması ile kredi olanaklarına erişimi genişletmiş ve ucuzlatmıştır. Japonya Kalkınma Bankası, önemli yerel yatırımları geliştirmek ve desteklemek amacıyla bir kredi politikası uygulamıştır. Bu noktada Japonya Kalkınma Bankasının temel yerel endüstrileri (enerji ve metal üretimi gibi) geliştirmek için kredi politikası uygulamaları yaptığı görülmektedir. Bu ekonomi politikası, hem Japonya Kalkınma Bankası'nı hem de ticari bankaları içeren çok cömert bir kredi politikasıyla tamamlanmıştır. Bu durum Japonya'da daha önceleri bulunan zaibatsu'yu anımsatan ve bir endüstriyel konglomera olan keiretsu türü firmaların dikey ve yatay yoğunlaşmasını teşvik etmiştir (Coates, 2000, Caldentey, 2009:28,29). Ayrıca MITI, Endüstriyel Rasyonalizasyon Konseyi ile demir, çelik, kömür ve makine sektörleri arasındaki tamamlayıcılık, fiyatlandırma, üretim ve ihracat problemlerini başarılı bir şekilde çözmüştür (Ozaka,1997, Kaynak,2020:80).

Johnson'a(1982) göre Japonya'nın kalkınmasını sağlayan temel faktör olan hızlı sanayileşmesini sağlayan temel unsur, özel sektörün bürokratlar tarafından sıkı bir biçimde yönlendirilmesidir. Özellikle MITI'nin uzun vadeli ekonomik planlar yapabilmesi ve uygulaması bu başarıyı sağlamıştır (Oğuz,2013:108).

Japonya'da 1960'lı ve 1970'li yıllarda, ihracat endüstrilerinin yaratılması, dayanıklı tüketim mallarının üretimi ve teknolojik olarak gelişmiş tüketici ürünlerinin yaratılması önem kazanmıştır. 1980'li yıllarda, MITI dikkatini yüksek büyümeli teknolojik endüstrilerin geliştirilmesine odaklanmıştır. Bu gelişim aşamasında, MITI yüksek büyümeli teknolojik endüstrilerin geliştirilmesi için vergi teşvikleri uygulamış ve kamu-özel sektör işbirliğini artırmıştır. Bunları yaparken tekstil, şeker rafinasyonu, karton, kimyasallar, çelik vb. gibi 'yapısal olarak durgun' endüstrilerle de ilgilenmiştir(Coates 2000: 213–23, Caldenty,2009:29).

Japonya'da genel olarak devlet, sermaye piyasası işlevini büyük ölçüde yerine getirmiş, dönüşüm sağlayacak yatırım kararlarında özel sektöre destekler vermiş ve teşvik etmiştir (Evans, 1989). Bu sayede devlet kamu yardımları ve altyapı yatırımları aracılığıyla planlama kurumlarının sanayileşmeyi rasyonel hale getirmesine olanak sağlamıştır. Bu gelişimin gerçekleşmesinde özel sektör işletmelerinin piyasa koşullarına dayalı olarak verdikleri geribildirimler önemli işlev görmüştür. Devlet, özel sektör işletme kararlarının kalkınmacı hedeflere uygun yönlendirilmesini sağlamayı hedeflemiş ve başarmıştır. Bu hedefe ulaşma konusunda, işletmelerin kar zarar koşulları, ihracat beklentileri, hammadde maliyetleri ve vergi giderleri gibi konularda verdikleri bilgiler son derece önemli rol oynamıştır(Johnson, 1987, Kaynak,2020:81). Japonya, başlangıçta enerji ve metal üretimi sektörleri gibi temel yerel endüstrileri desteklemiş, ardından otomotiv sanayi, elektronik, yarı iletkenler, makine ve robotik teknolojileri gibi yüksek büyümeli teknolojik endüstrileri desteklemiştir. Günümüzde yeşil enerji ve çevre teknolojileri alanları ön plana çıkmıştır.

Kısacası Japon devleti sanayi politikasına rehberlik etme konusunda, kilit endüstrileri desteklemede ve kamu ile özel sektör arasındaki yakın işbirliği yoluyla ekonomik planlamayı koordine etmede önemli bir rol oynamış ve kalkınma konusunda başarılı olmuştur.

4.2. Güney Kore: Japonya'nın kalkınma deneyimi Güney Kore gibi diğer geç sanayileşen ülkeler tarafından takip edilmiştir. Kore Savaşı'ndan(1950-53) sonra, Güney Kore, devlet öncülüğünde, ihracata yönelik sanayileşme politikası uygulamıştır. Güney Kore, Japonya'nın MITI örneğini takip ederek, ilk beş yıllık planı (1962-66) kabul etmiş ve Ticaret ve Sanayi Bakanlığı'nı kurmuş ve Ekonomik Planlama Kurulu'nu oluşturmuştur. Döviz kurunu yerel üreticiler için rekabetçi hale getirmek için periyodik devalüasyonlar ile ihracat sübvansiyonlarını birleştiren bir döviz kuru politikası uygulanmıştır. Döviz kurunun yönetimi, kredi politikaları ve finansal kaynakların kontrolüyle bir arada yürütülmüştür. Bunun için hükümet, ülkenin büyük bankalarını millileştirmiş ve teşvik edilmesi hedeflenen endüstrilere ucuz kredi sağlamıştır. Buna ek olarak faiz oranlarını, işletmelerin üretim tekniklerini değiştirmesini teşvik etmek için kullanmıştır. Kalkınma politikalarının benimsenmesi beraberinde endüstrinin yoğunlaşmasını getirmiştir(Caldenty,2009:29).

Güney Kore'de, ilk iki beş yıllık Kalkınma Planı, devlet araçlarının kurulması, tanımlanması, mükemmel hale getirilmesi ve kendi kendine yeterliliğin sağlanmasına odaklanmıştır. Üçüncü plan (1971–75) kırsal ekonominin dinamik gelişimine, ihracatta yüksek ve sürdürülebilir bir artış sağlanmasına ve ağır ve kimyasal endüstrilerin kurulmasına odaklanmıştır (Lie 1998:52). Bu aşamada kalkınmacı devletin odağı, Güney Kore ekonomisinin önemli bir bölümünü kontrol eden chaebol'lerin (aile işletmesi konglomeralar) kurulması aracılığıyla kurumsal büyümenin sağlanmasına yönelmiştir. 1990'larda ise yüksek teknoloji endüstrilerin gelişmesinin sağlanması kalkınmacı devletin odağını oluşturmuştur(Caldenty,2009:30).

Güney Kore'de Beş yıllık Kalkınma Planları 1996 yılına kadar başarı ile uygulanmıştır. Asya Krizinin ortaya çıkmasıyla Güney Kore 1997 yılında beş yıllık kalkınma planı uygulamalarına son verilmiş ve 1998 yılından itibaren kısa vadeli programlar uygulamasına geçilmiştir (Hava,2021:2183).

Güney Kore'de, chaebol'lerin kontrolü önemli oranda bankacılık sisteminin millileştirilmesi ile başarıya ulaşmıştır. Bu noktada devlet işletmelere verilecek krediler konusunda yetkileri elinde bulundurmuş ve bu sayede chaebol'lerin gelişmesini ve aynı zamanda mali olarak sübvansiyon edilmelerini mümkün kılmıştır. Devlettten aldıkları sübvansiyonların karşılığı olarak chaebol'lerin, katı performans standartlarını sağlaması beklenmiştir. Güney Kore'nin önemli chaebol grupları, Samsung, Hyundai, LG ve Daewoo olarak gösterilebilir. Sıkı sermaye kontrolleri nedeniyle chaebol'lerin devletin bilinçli yönlendirmesi ile işbirliği yapmaktan başka seçeneği kalmamıştır. Dolayısıyla G. Kore'nin kalkınma süreci, serbest piyasanın görünmez eli anlayışı ile değil, güçlü devletin görünür eli anlayışı ile gerçekleşmiştir (Amsden, 1989). Bunlara ek olarak kamu, yabancı yatırımları ve ticareti sıkı bir biçimde düzenlemiş, hammaddeye erişmeyi kontrol etmiş, bunun yanında sanayilere ve stratejik bölgelere seçici olarak altyapı sağlamış ve ayrıca eğitim ve beceri geliştirilmesi konusuna yatırım sağlamıştır (Kaynak,2020:82). Güney Kore'de devlet, başlangıçta ağır sanayi ve kimyasal endüstrileri desteklemiştir. Sonraları ise otomotiv endüstrisi, elektronik ve yarı iletkenler, gemi inşaatı ve denizcilik sanayisi gibi yüksek teknoloji endüstrileri desteklemiştir. Günümüzde bilgi teknolojileri, yeşil enerji ve yenilenebilir teknolojiler alanlarını desteklemektedir.

Kısacası Güney Kore ekonomisi 1960'lı yıllardan sonra büyük bir büyüme süreci yaşamıştır. Genel olarak bakıldığında bu süreçte devletin, belirli sektörlerle destek sağladığı, ihracata dayalı büyüme politikaları uyguladığı ve büyümeyi teşvik etmek için ekonomiye aktif olarak müdahale ettiği görülmektedir. Ayrıca devletle büyük holdingler arasındaki yakın ilişkinin de bu gelişmede kilit bir rol oynadığı görülmektedir.

4.3. Singapur: Singapur, 1965 yılında bağımsızlığını elde etmiştir. Bağımsızlığını kazandığı 1965 yılından sonra hızlı bir ekonomik büyüme yaşamış, 1976-2018 döneminde reel büyüme hızı ortalama %6,5 oranında gerçekleşmiştir. Singapur'un ekonomik başarısının temelinde, uluslararası girişimcilere yönelik, şeffaf, güvenilir ve öngörülebilir bir ekonomik model oluşturmaları bulunmaktadır. Ekonomi yönetiminde devlet, uzun-vadeli planlama yapmakta ve rasyonel kararlar almaktadır. Bu alanda iyi yönetim, hesap verilebilirlik ve sürdürülebilirlik ön plana çıkarılmaktadır. Ayrıca Singapur iş kurma ve iş yapma kolaylığı kriterlerinde dünyada birinci sırada bulunmaktadır. Buna ek olarak Singapur'un deniz ve hava ulaşımında küresel odak noktalarından biri olması, hukukun üstünlüğü konusunda en iyi performansla sahip dünya ülkeleri arasında on yedinci sırada yer alması ülkeyi yabancı yatırımcılar için cazibe merkezi haline getirmektedir (T.C. Singapur Büyükelçiliği, 2023:1). Singapur ekonomisinde devlet iş olanakları yaratan ve ihracat için mal üretimi yapacak olan yabancı yatırımcıları desteklemiştir. Dolayısıyla Singapur'da yabancı sermaye ekonomik büyüme için temel faktörlerden birini oluşturmuştur(Kaynak,2020:82). Ülke dünya ekonomisindeki önemli finans merkezlerinden biri konumundadır.

Singapur, stratejik ekonomik planlama uygulaması ve müdahaleci politikaları sebebiyle genellikle kalkınmacı bir devlet olarak kabul edilmektedir. Devlet, özellikle ülkeyi küresel bir finans merkezine dönüştürmek için gereken politikalar konusunda aktif rol oynamıştır. Örneğin, bu alana yönelik altyapı geliştirme, eğitim ve doğrudan yabancı yatırımları kendine çekme gibi alanlarda aktif olarak yer almıştır. Bunun yanında Singapur'da devlete bağlı işletmeler ekonominin büyük bir kısmını oluşturmaktadır ve kamu-özel sektör arasında yakın işbirliği vardır. Singapur, kalkınma için özellikle finans ve bankacılık sektörünü desteklemiştir. Bunun yanında liman ve lojistik sektörü, yüksek teknoloji ve yarı iletkenler, petrol ve petrokimya endüstrisi, dijital ekonomi ve yapay zeka gibi sektörleri desteklemektedir. Ayrıca diğer kalkınmacı devletlerde olduğu gibi Singapur'da ihracata dayalı büyüme stratejisini benimsemiştir. Ancak diğer kalkınmacı devletlerden farklı olarak Singapur'un kalkınma sürecinde yabancı sermaye yatırımları kilit rol oynamıştır.

4.4. Tayvan: Tayvan da yeni sanayileşen ülkeler sınıflandırmasında bulunmaktadır. 1960'lı yıllardan itibaren Güneydoğu Asya ülkelerinde yaşanan yeni sanayileşme hareketine Tayvan da katılmış ve başarılı bir şekilde sanayileşmiştir. Bu tarihten itibaren Tayvan, ithal ikamesi politikalarından vazgeçerek ihracata dayalı büyüme politikaları uygulamıştır. Devlet uyguladığı güçlü ekonomi politikaları sayesinde istikrarlı fiyatlar elde etmiş ve göreceli olan eşit gelir dağılımı ile başarılı ekonomi politikaları uygulamıştır. Devlet, Küçük ve orta ölçekli işletmelerin(KOBİ) korunması ve başarılı olması amacıyla; yeni firmaların kurulmasını teşvik etmek, altyapıyı geliştirmek ve bebek endüstrileri korumak politikalarını uygulamıştır. Ekonominin genelinde KOBİ'lere dayalı hafif sanayi uygulamaları gerçekleştirilmiş ve devlet tarafından sağlanan teşviklerle ülke ihracatı yükseltilmiştir. Ayrıca Tayvan, özellikle bilişim alanında ve ileri teknolojik ürünler imalatı konusunda önemli bir merkezi haline gelmiştir(Arslan, 2018:66,69,71).

Güney Kore'de olduğu gibi, Tayvan dikey olarak bütünleşmiş endüstrilere sahip bir ekonomi kurmayı hedeflemiştir. Tayvan devleti, esnek ve entegre bir üretim yapısı kurmak için yatırım bileşimini kontrol etmeyi amaçlamıştır. Tayvan, kısmen ekonomisinin ölçeği nedeniyle, konglomera şeklindeki büyük holdinglerin gelişimini teşvik etmeye çalışmamış, onun yerine KOBİ'lerin gelişimine odaklanmıştır (Kwon, 2007, Caldentey, 2009:49). Tayvan'da devlet, KOBİ'lerin finansman için önemli ölçüde bağımlı oldukları bankalar aracılığıyla onları kontrol etmiş ve yönlendirmiştir. Ülkedeki yüksek tasarrufları, hedeflenen sanayi politikasına uygun biçimde bankacılık sistemi ile yatırımcılara aktarmıştır. Devlet, finansman sistemi üzerinde disiplinli bir kontrol mekanizması kurmuştur. Tayvan'da kalkınmacı devlet, hangi ürünlerin ve teknolojilerin teşvik edileceğini belirlemiş ve ardından bu sanayilerdeki yatırımları finanse etmek amacıyla kamu kaynaklarını kullanmıştır. Tayvan'da kontrol mekanizmasında yer alan disiplinli yaklaşımla devlet, banka ve kamu kurumlarından kredi ve sübvansiyonlar alan özel sektör işletmelerinin öngörülen alanlarda yatırım yapıp yapmadıklarını, üretim standartlarına uygun üretim sağlayıp sağlamadıklarını kontrol etmiştir. Bununla üretim ve dağıtım davranışının tüm aşamalarının kalkınmacı devlet doğrultusunda uygulayıp uygulamadıklarını kontrol etmiştir(Kaynak,2020:82,83). Tayvan'da devlet yarı iletkenler ve elektronik sanayi, bilgi teknolojileri ve donanım üretimi, savunma sanayi ve havacılık, biyoteknoloji ve sağlık teknolojileri, yeşil enerji ve yenilenebilir teknolojiler, akıllı üretim ve otomasyon gibi sektörleri desteklemiştir.

Kısacası Tayvan'ın ekonomik başarısı genel olarak kalkınmacı devlet modeline bağlanmaktadır. Tayvan'da devlet, ihracata dayalı büyüme politikası uygulamış, elektronik, yarı iletken sanayi, bilişim teknolojileri ve teknoloji inovasyonu gibi kilit endüstrileri ve KOBİ'lerin gelişimini desteklemiş, bununla birlikte eğitime de yatırım yapmış ve başarılı bir ekonomik dönüşüm gerçekleştirmiştir.

4.5. Hong Kong: Hong Kong'da devlet, işletmeler üzerinde doğrudan kontrolden büyük ölçüde kaçınmış ve kalkınmacı devlet anlayışını "hafif" devlet müdahalesi şeklinde bir uygulama olarak gerçekleştirmiştir. Hong Kong'un sahip olduğu küçük ölçekli işletmeler, Güney Kore veya Tayvan'da uygulanan seçici sanayi politikası olmadan da uluslararası rekabete imkan sağlamıştır. Hong Kong'ta devletin ekonomiye katılımı her zaman doğrudan yollarla değil dolaylı yollarla gerçekleşmiştir. Örneğin, Hong Kong Ticaret Geliştirme Konseyi; sanayi siteleri ve ileri üniversite temelli bilim ve teknoloji tesislerinin kurulmasını kapsayan altyapı geliştirilmesi üzerinde çalışmıştır. Bununla birlikte ülkede belirlenen sektörleri veya işletmeleri sübvansiyon etmek için önemli programlar oluşturulmamıştır (Kaynak,2020:84).Hong Kong, ihracata dayalı ekonomik büyüme stratejisini benimsemiştir ve ülke serbest ticaret bölgesidir. Ekonomi politikası olarak serbest ticaret politikası izlenmektedir. Ayrıca mal ithalatı ve ihracatında gümrük vergisi bulunmamaktadır.

Dolayısıyla Hong Kong'u doğrudan yabancı yatırımlar (DDY) için bir cazibe merkezi konumundadır. Hong Kong'u DDY için cazip hale getiren başlıca unsurlar şunlardır; stratejik konumu nedeniyle dünyanın en büyük piyasası olan Çin piyasasına giriş için önemli bir kapı konumundadır, serbest liman statüsüne sahiptir, basit vergi sistemine sahiptir ve bu durumdan kaynaklanan teşvikler bulunmaktadır, güçlü altyapısı vardır ve yargı güvenliği üst seviyededir. Bunlara ek olarak yabancı uluslararası şirketlerin bölgesel merkezleri için ideal bir konumda yer almaktadır(Kocaeli Sanayi Odası,2024:9).

Hong Kong ihracata yönelik sanayileşme stratejisi uygulamıştır ancak bunu yaparken herhangi bir stratejik sanayi politikası veya uzun vadeli rasyonel ulusal sanayileşme politikası meydana getirmemiştir. Hong Kong devlet kalkınmacı anlayış çerçevesinde hafif müdahale uygulamış, bu da pozitif müdahalesizcilik olarak isimlendirilmiştir (Kaynak,2020:85).

Hong Kong, Güney Kore, Japonya veya Tayvan'daki gibi sanayi odaklı, devlet yönlendirmeli kalkınma stratejileri yerine, altyapı, eğitim ve finansal düzenlemeler gibi alanlara odaklanmıştır. Devlet, klasik kalkınmacı devletlerden farklı bir yol izlemiştir. Devlet, sanayi politikaları ile doğrudan belirli sektörleri teşvik etmek yerine, altyapı yatırımları yapmak, beşeri sermayeyi geliştirmek, finans sektörünü düzenlenmek, teknoloji ve inovasyon destekleri sağlamak gibi politikalarla ekonomik büyümeye yön vermeye çalışmıştır. Hong Kong, finans sektörünü düzenleyerek ve teşvik ederek küresel bir finans merkezi konumuna gelmeyi başarmıştır. Hong Kong, ekonomik başarısıyla dikkat çeken bir bölge olsa da, kalkınmacı devlet modeliyle tam olarak örtüşmemektedir. Daha çok serbest piyasa odaklı, düşük vergili ve minimum devlet müdahalesine dayalı bir büyüme stratejisi izlemiştir. Bu yüzden Hong Kong, tam anlamıyla bir kalkınmacı devlet olarak kabul edilmemektedir ancak belirli yönleriyle kalkınmacı devlet politikalarını uygulamıştır.

4.6. Çin: Çin, 1990'lı yıllardan itibaren önemli ekonomik reformları uygulamaktadır. Özellikle Deng Xiaoping yönetimindeki ekonomik liberalleşmenin ilk döneminde, kalkınmacı bir devletin özelliklerini de göstermiştir. Bu kapsamda Çin devleti, bazı endüstrileri ve bölgeleri desteklemeye yönelik stratejik müdahalelerde bulunmuş, ülkenin merkezi planlı bir ekonomiden daha pazar odaklı bir ekonomiye geçişini sağlamada önemli bir rol oynamıştır.

Deng Xiaoping'in liderlik etmesiyle başlayan piyasa ekonomisine geçiş reformları ile dünya ekonomi tarihinde Çin en hızlı büyüyen ülkelerden biri olmuştur ve insanların yaşam standardı çeyrek yüzyıl içinde önemli ölçüde yükselmiştir. Özellikle son yirmi yıldan bu yana Çin, küresel ekonomik sistemin giderek daha çok içinde yer almaktadır. Kalkınmada yakaladığı hızlı ivme ile de tüm dünyanın ilgisini çekmeye devam etmektedir (Öztürk vd.,2006:71).

Reform ve Dışa Açılma Dönemi, 1978-1992 yılları arasındaki Deng Xiaoping Rehberliğinde Piyasa Ekonomisine Geçiş dönemidir. Bu dönemde özel sektör yatırımlarına ve yabancı yatırımlara kademeli olarak izin verilmiştir. Özel Ekonomik Bölgeler(SEZ) kurularak yabancı yatırımlar teşvik edilmiştir (Shenzhen, Guangzhou gibi bölgeler). Devlet, sanayi politikalarıyla belirli sektörleri desteklemeye başlamıştır. Bu dönemin sonunda Çin ekonomisi hızla büyümeye başlamış, dış ticaret artmış ve Çin, küresel üretim üssü olmaya başlamıştır. 1992-2008 yılları arası hızlı sanayileşme ve ihracata dayalı büyüme dönemidir. Çin'in ekonomik büyümesinde ihracat önemli bir rol oynamıştır. Devlet teşvikli sanayileşme politikaları özellikle çelik, otomotiv ve elektronik sektörlerinde uygulanmıştır. Çin, Dünya Ticaret Örgütü'ne (WTO) 2001'de katılarak küresel ekonomiye tam entegre olmuştur (Dibo, 2017:168). Büyük ölçekli altyapı projeleri (havaalanları, limanlar, otoyollar) inşa edilmiştir. Tekstil, elektronik ve otomotiv sektörlerinde küresel bir üretim merkezi haline gelmiştir. Bu gelişmelerin ekonomik sonuçları olarak Şangay ve Pekin gibi şehirler büyük finans merkezlerine dönüşmüş, 1990'lı yıllarda çift haneli büyüme oranlarına ulaşmış ve küresel ihracatta lider ülkelerden biri konumuna yükselmiştir. 2008 yılından günümüze kadar olan dönem ise Çin için teknoloji, yenilik ve iç tüketim odaklı dönemdir. Çin, ABD ile küresel teknoloji ve ekonomi rekabetinde önemli bir aktör hâline gelmiştir. Ülkede iç tüketimin önemi artmış ve orta sınıf büyümüştür. Ayrıca yüksek teknoloji ve inovasyona dayalı üretim artmıştır.

Çin ekonomisi, yabancı kaynakları Ar-Ge yatırımlarına yönlendirerek çift taraflı ekonomik büyüme ve kalkınma stratejisi denilen bir yöntem uygulamıştır. Bu uygulama ile GSYH'nın giderek artan bir kısmını Ar-Ge yatırımlarına ayırmayı hedeflemiştir. Bu strateji sonucunda 1990'dan sonra Microsoft, Google ve General Motors gibi 500 şirket Çin'de Ar-Ge merkezi kurmuşlardır. Sonuç olarak Çin, geleceğin zenginlik kaynağı olan bilgi ve inovasyon ekonomisi için sağlam bir alt yapı oluşturmayı başarmıştır (Dibo, 2017:169). Çin, başlangıçta ağır sanayi ve çelik, otomotiv ve elektronik sektörlerini desteklemiştir. Ardından iletişim, yapay zeka, yenilenebilir enerji ve yeşil teknolojiler, e-ticaret ve dijital ekonomi ve havacılık ve uzay sanayisi alanlarını desteklemektedir.

Kısacası Çin, kalkınmacı devlet anlayışı ile devlet kapitalizmi modelini uygulamış ve devletin yönlendirdiği şirketlerin büyümesini destekleyip teşvik edilmiştir. Çin'in kalkınmacı devlet politikaları, planlı ekonomi ile piyasa ekonomisinin birleşimi şeklinde gelişmiştir. Devlet, teknoloji, altyapı ve sanayiye alanında büyük yatırımlar yapmıştır. Beş Yıllık Planlar ile ekonomik büyüme stratejik olarak planlanmış ve uygulanmıştır. Dış ticaretini arttırmayı ve küresel üretim üssü olmayı başarmıştır. Hızlı sanayileşme ve ihracata dayalı büyüme stratejilerini uygulamıştır. Kalkınmacı devlet modelini benimseyerek ekonomik büyümeyi, devletin yönlendirdiği sanayileşme, teknoloji geliştirme, altyapı yatırımları yapma politikalarıyla ve küresel ekonomik entegrasyon ile başarmıştır.

4.7. Malezya: Malezya ekonomisi, yeni sanayileşmiş ülke grubunda yer almaktadır ve kalkınmacı devlet uygulamalarının örneklerinden biridir. Malezya, hemen hemen kırk yıldır ihracata dayalı gelişme stratejisi uygulamaktadır ve ülke ihracata dayalı büyüme hipotezinin geçerliliğini gösteren ülkelerdendir (Bal vd., 2022:308). 1970 yılların başında Yeni Ekonomi Politikası (NEP) uygulaması ile kalkınmacı devlet yaklaşımını benimsemiştir. Yeni ekonomi politikası genel olarak etnik gruplar arasındaki ekonomik eşitsizlikleri gidermeyi, olumlu ayrımcılık programları uygulayarak bazı sektörlere devlet müdahalesi yapmayı ve bu şekilde genel ekonomik kalkınmayı gerçekleştirmeyi hedeflemiştir.

İhracata dayalı büyüme stratejisine ek olarak kalkınma için imalat sektörü büyümede öncü sektör olarak seçilmiş ve imalat sektörünün gelişmesi amacıyla doğrudan yabancı yatırımların çekilmesi hedeflenmiştir. Malezya'nın başarılı olmasını sağlayan önemli bir faktörlerden biri devletin sanayileşme sürecine dâhil olmasıdır. Devlet bu alanda teknolojik yeterliliği yükseltmek ve yaygın hale getirmek için katkı sağlamıştır. Devlet, teknolojik yeteneğe sahip beşeri sermayeyi oluşturmak için yatırım yapmış, ekonominin arz yönünde satın alma politikalarında destek ve geliştirmeyi koordine etmiş, Ar-ge merkezleri ve teknoloji parkları kurmuştur. Diğer taraftan teknolojik yeterliliğin yükseltilmesi amacıyla finansal ve mali destekler sağlayarak eğitim programları uygulamıştır. Malezya'nın ekonomik yapısında imalat sektöründe büyük oranda dış ticarete konu mallar üretilmektedir. Dolayısıyla imalat sektörünün verimlilik artışı dış ticaretle daha güçlü bağlantı halindedir. Malezya'da devlet tarafından gerçekleştirilen uzun dönemli planlama, yüksek sermaye harcamaları, işgücüne teknolojik yeterlilik kazandırılması, ürün geliştirme ve ölçek ekonomilerinden faydalanma gibi politikalar Malezya'nın sanayileşme girişimlerinin kanıtıdır (Tik, 2009). Malezya ekonomisi, 2010 yılında uygulamaya başladığı Yeni Ekonomi Modeli (NEM) ile uygulamakta olduğu ihracata dayalı büyüme modeli uygulamalarını güçlendirmeyi ve aynı zamanda yenilik temelli bir büyüme modeline dönüştürmeyi öngörmektedir. (Bal,2022:309, 310). Yeri gelmişken şunu da belirtmek gerekir ki Malezya'nın NEM kapsamında yenilik temelli büyüme modelini ihracata dayalı büyüme modeli ile birleştiren vizyonu gibi kalkınmacı devlet kavramı da son zamanlarda yeni kalkınmacı devlet biçiminde girişimci devlet (Mazzucato, 2013:44) ve yenilikçi devlet (Chopra, 2014) gibi kavramlarla bir arada anılmaya başlamıştır (Böyükaslan ve Tiryakioğlu,2016:595).

Malezya günümüzde güçlü bir ekonomiye sahiptir. Bu güçlü ekonomiyi oluşturan faktörler yüksek teknolojik ürünleri ihraç etmesi, hızla büyüyen ihracat odaklı ekonomik yapısı, göreceli olarak düşük milli gelir vergileri uygulamasıdır. Ayrıca Malezya, küresel yarı iletken piyasası açısından önemli bir merkezdir ve dünyanın üçüncü büyük yarı iletken cihaz ihracatçısı konumundadır. En önemli faktör ise çalışmada yer alan diğer ülke örneklerinde büyük çoğunluğunda olduğu gibi sanayileşmedir. Malezya sanayi bakımından gelişmiş bir ülke konumuna ulaşmayı başarmıştır. Malezya'da kalkınmacı devlet, elektronik ve yarı iletken sanayi, petrokimya endüstrisini, otomotiv ve ulaşım sanayini, palm yağı ve tarımsal sanayi, finans ve islami bankacılık sektörlerini desteklemiş ve altyapı sektörlerine kamu desteği sağlamıştır. Günümüzde yeşil enerji ve yenilenebilir teknolojiler alanlarını da desteklemektedir.

Kısacası Malezya 1980'lerden itibaren devletin yönlendirdiği sanayileşme, ihracata dayalı büyüme ve ekonomik planlama stratejileriyle kalkınmacı devlet modeline uygun bir yol izlemiştir. Malezya'nın kalkınmacı devlet özelliklerini şu şekilde özetleyebiliriz: Birincisi ülkede güçlü devlet müdahalesi vardır. Devlet, ekonomik kalkınmayı yönlendiren aktif bir aktör olmuştur. Özellikle sanayi politikaları ve devlet destekli şirketler ön plana çıkmıştır. İkincisi kalkınma için sanayileşme ve ihracata dayalı büyüme yaklaşımını benimsemiştir. Bu alanda elektronik, otomotiv (örneğin Proton), palmye yağı ve doğalgaz gibi sektörler ön plana çıkmıştır. Üçüncüsü devlet, büyük işletmeleri destekleyerek özel sektör ile güçlü bağlar kurmuştur. Bilindiği gibi devlet destekli büyük işletmeler kalkınmacı devlet modeline özgü bir durumdur. Dördüncüsü uzun vadeli ekonomik planlar yapmış ve ekonomik dönüşümü stratejiler belirleyerek gerçekleştirmiştir. Beşincisi teknoloji alanına öncelik vermiş, buna ek olarak yabancı yatırım çekmeyi de hedeflemiştir. SEZ'ler ve serbest ticaret bölgeleri (FTZs) oluşturarak yabancı yatırımın ülkeye gelmesini teşvik etmiştir. Kısacası Malezya, Güney Kore ve Japonya kadar katı bir kalkınmacı devlet modeli izlememiştir ancak sanayileşme, devlet destekli büyüme ve uzun vadeli ekonomik planlama gibi temel kalkınmacı devlet prensiplerini uygulamıştır. Bu yüzden ılımlı bir kalkınmacı devlet modeli olarak kabul edilmektedir.

5. Kalkınmacı Devletlerin Ortak Özellikleri

Bu çalışmada incelenen ülke örnekleri, kalkınmaya yönelik devlet modellerinin çeşitliliğini ve farklı ülkelerin yaklaşımlarını kendi benzersiz koşullarına ve kalkınma hedeflerine uyacak şekilde nasıl uyarladıklarını göstermektedir. Aşağıdaki tabloda kalkınmacı devlet anlayışı ekseninde yeni sanayileşen (geç kalkınan) ülkelerin ön plana çıkan ortak özellikleri yer almaktadır.

Tablo 1: Kalkınmacı Devletlerin Ortak Özellikleri

	İhracata dayalı büyüme stratejisi uygulanması	Sanayileşme politikalarının uygulanması	Belirli endüstrilerin ve sektörlerin devlet tarafından desteklenmesi	Altyapı ve ulaşım konusunda devletin destek sağlaması	Eğitime yatırım yapılması	Kamu ile özel sektör arasındaki yakın işbirliği	Devletin büyük teknoloji yatırımları yapması
Japonya	✓	✓	✓	✓	✓	✓	✓
Güney Kore	✓	✓	✓	✓	✓	✓	✓
Çin	✓	✓	✓	✓	✓	✓	✓
Singapur	✓	✓	✓	✓	✓	✓	✓
Tayvan	✓	✓	✓	✓	✓	✓	✓
Malezya	✓	✓	✓	✓	✓	✓	✓
Hong Kong	✓		✓	✓	✓	✓	

Kaynak: Yazar tarafından oluşturulmuştur.

Bu çalışmada ele alınan kalkınmacı devlet örneklerinin tamamının, ihracata dayalı büyüme stratejisini benimsediği ve uyguladığı görülmektedir. Dolayısıyla ihracata dayalı büyüme stratejisi ortak özelliktir. Kalkınma için sanayileşme politikalarının uygulanması konusunda Hong Kong hariç diğer ülkelerin tümünün bu politikayı benimsediği ve başarılı bir şekilde uyguladığı görülmektedir. Hong Kong, Güney Kore, Japonya veya Tayvan'daki gibi sanayi odaklı, devlet yönlendirmeli kalkınma stratejileri uygulamak yerine, altyapı, eğitim ve finansal düzenlemeler gibi alanlara odaklanmış ve klasik kalkınmacı devletlerden farklı bir yol izlemiştir. Belirli endüstrilerin ve sektörlerin devlet tarafından desteklenmesi konusunda bu çalışmadaki ülkelerin tamamının bu politikayı uyguladığı görülmektedir dolayısıyla bu da ortak özelliktir. Japonya, Güney Kore, Çin ve Tayvan'ın başlangıçta ağır sanayi ve çelik, otomotiv ve elektronik sektörlerini destekledikleri görülmüştür. Ardından yüksek büyümeli teknolojik endüstrileri desteklemişlerdir. Günümüzde yeşil enerji ve çevre teknolojileri alanları ön plana çıkmıştır. Japonya'da devlet hem büyük ölçekli işletmeleri hem KOBİ'leri desteklemiştir. Güney Kore, kalkınma için ekonomideki büyük ölçekli işletmeleri ve holding gruplarını da desteklerken Tayvan KOBİ'leri desteklemiştir. Singapur, kalkınma için özellikle finans ve bankacılık sektörünü, yarı iletkenler ve petrokimya endüstrisini desteklemiştir ve ayrıca kalkınmasında yabancı yatırımlar kilit rol oynamıştır. Malezya'da devlet elektronik ve yarı iletken sanayi, petrokimya endüstrisini ve otomotiv sektörünü desteklemiştir. Hong Kong, doğrudan devlet desteği sağlamasa da finans sektörünü düzenleyerek ve teşvik ederek küresel bir finans merkezi konumuna gelmeyi başarmıştır. Altyapı ve ulaşım konusunda devletin destek sağlaması, eğitime yatırım yapılması ve kamu ile özel sektör arasındaki yakın işbirliği alanları çalışmada yer alan tüm ülkelerin ortak özellikleridir. Devletin büyük teknoloji yatırımları yapması ise Hong Kong hariç diğer ülkeler için ortak özelliktir.

SONUÇ

Özetleyecek olursak kalkınmacı devletler, güçlü bir devlet müdahalesiyle ekonomik büyümeyi teşvik eden, sanayileşmeyi destekleyen ve özel sektörle yakın işbirliği içinde bir kalkınma stratejisi izleyen ülkelerdir. Bu model özellikle Japonya, Güney Kore, Tayvan, Singapur, Malezya ve Çin gibi hızlı sanayileşen ülkelerde başarıyla uygulanmıştır. Bu ülkeler, güçlü bürokrasi, sanayi politikaları ve devlet-özel sektör işbirliği stratejileri ile kalkınmayı başarmıştır. Sadece Hong Kong, devletin doğrudan sanayileşme stratejisi uygulamaması nedeniyle diğerlerinden ayrılmaktadır.

Genel olarak değerlendirildiğinde bu çalışmada yer alan kalkınmacı devletlerin her birinin kendi özgü ekonomik koşulları olmasına rağmen ortak noktaları olarak şunları özetleyebiliriz: Birincisi bu ülkelerin tamamı ihracata dayalı sanayileşme stratejisi uygulamış, ihracat kredileri, vergi teşvikleri gibi ihracatı teşvik eden ekonomi politikaları ile ihracatı desteklemiştir. İkincisi belirli endüstriler ve sektörler devlet tarafından desteklenmiştir. Kalkınmayı başarmak için devlet belirli sektörleri teşvik ederek sanayi politikaları uygulamıştır. Bu ülkelerde bazı sanayi sektörleri öncelikli sektörler olarak belirlemiş ve bu sektörlerin ihtiyaçlarına yönelik destekler sağlamıştır. Özellikle yüksek teknoloji endüstrilerinin geliştirilmesi hedeflenmiştir. Bu konuda devletler tarafından araştırma enstitüleri, Ar-Ge laboratuvarları kurulmuş ve özel sektörün teknoloji alanındaki Ar-Ge çalışmaları desteklenmiştir. Üçüncüsü devlet ve özel sektörün yakın işbirliği

yapmasıdır. Devletin özel sektörle yakın çalışarak kalkınma hedeflerini belirlemesi söz konusu olmuştur. Devletin kalkınmayı başarma fonksiyonunu yerine getirmek için buna yönelik özel kurumlar oluşturduğu görülmektedir. Dolayısıyla bu noktada güçlü ve müdahaleci devlet anlayışı ile ekonomik kalkınmaya yön veren etkin bir bürokrasiye sahip oldukları görülmektedir. Ayrıca bu ülkelerin çoğunluğunda altyapı ve ulaşım konusunda devlet destek sağlamış ve buna ek olarak uzun dönemli bir yatırım olan eğitime önem verilmesi ve yatırım yapılması konusunda aktif rol oynamıştır.

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Türkiye’de Ekonomik Büyüme ve Turizm İlişkisi: 2004-2023 Panel Veri Analizi

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Özet: Ekonomik büyüme ve kalkınma her ülkenin başarmak istediği hedeflerden birisidir. Gelişmiş ülkeler için ekonomik büyüme oranlarını yüksek tutmak, gelişmekte olan ülkeler içinse pozitif ve yüksek ekonomik büyümeyi oranlarına sahip olmak ve beraberinde ekonomik kalkınmayı sağlamak temel amaçlardır. Bu noktada turizm sektörü ülkelerin ekonomik büyümesine ve bölgesel kalkınmaya katkı sağlayan önemli sektörlerden birisidir. Bu çalışmada Türkiye’de en çok turist gelen İstanbul, Antalya, Muğla, İzmir ve Aydın illerinde ekonomik büyüme ve turizm arasındaki ilişki test edilmiştir. Ekonomik büyümeyi temsilen il bazında kişi başına düşen gayri safi yurt içi hasıla (KBGSYH), turizmi temsilen ise bu illere gelen toplam turist sayısı dikkate alınmıştır. İl bazında veri kısıtlılığı nedeni ile çalışma 2004- 2023 yılları arasını kapsamaktadır. Oluşturulan panel verilere birimler arası korelasyon testi, homojenlik testi, birim kök testi ve nedensellik testi yapılmıştır. Araştırma sonuçlarına göre teori ile uyumlu olarak turist sayısından KBGSYH’ya doğru bir nedensellik ilişkisi bulunmuştur. Diğer bir değişle illere gelen turist sayısı illerdeki ekonomik büyümeyi etkilemektedir.

Anahtar Kelimeler: Ekonomik büyüme, turizm sektörü, panel zaman serisi analizi

Relationship Between Economic Growth and Tourism in Turkey: 2004-2023 Panel Data Analysis

Abstract: Economic growth and development is one of the goals that every country wants to achieve. For developed countries, keeping economic growth rates high and for developing countries, having positive and high economic growth rates and ensuring economic development are the main objectives. At this point, tourism sector is one of the important sectors that contribute to the economic growth of countries and regional development. In this study, the relationship between economic growth and tourism in the provinces of Istanbul, Antalya, Muğla, İzmir and Aydın, which have the highest number of tourists in Turkey, has been tested. The gross domestic product per capita (GDP per capita) for economic growth and the total number of tourists travelling to these provinces for tourism are taken into account. Due to data limitations on province basis, the study covers the period between 2004 and 2023. Inter-unit correlation test, homogeneity test, unit root test and causality test are applied to the panel data. According to the research results, a causality relationship was found from the number of tourists to the GDP per capita, in line with the theory. In other words, the number of tourists coming to the provinces affects the economic growth in the provinces.

Keywords: science park, innovation ecosystem, development, social cohesion

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1. GİRİŞ

Turizm kelimesinin kökenleri İngilizce “tour”, Latince “tornus” kelimelerine dayanmaktadır. İkisinin de kelime anlamı dairesel hareket eylemi yapmayı ifade etmektedir. Turizm bireylerin yoğun hayat düzeninden çıkarak dinlenmek ve hava değişimi ihtiyacını gidermek için doğal güzellikleri, tarihi mekânları ve inanç duyulan yerleri ziyaret ederek oluşturduğu eylemler ve yaptığı geziler olarak nitelendirilmektedir. Ekonomiye dayalı olan ve genel olarak turizm açısından tüm işlemleri kapsayan sektör “turizm sektörü” olarak tanımlanmaktadır (Birgücü, 2024: 32-33).

Turizm sektörü hem ülke ekonomisine döviz girişi sağlaması hem de istihdam açısından iş olanakları yaratması sayesinde ekonomik büyümeye olumlu katkı sağlayan ve ülke gelirini pozitif etkileyen sektörlerin başında gelmektedir. Ekonomik büyüme, en genel tanımıyla bir ülkenin üretim hacminde dönemler itibarıyla oluşan artıştır ve üretim hacimdeki artışı ölçmek için ülke Gayri Safi Yurt İçi Hasıla(GSYH) değerlerine bakılmaktadır (Turan, 2008: 11, Özel, 2012: 64, Kaynak, 2011: 84). Aynı zamanda kişi başına reel gelirden oluşan devamlı artış ekonomik büyüme olarak tanımlanmaktadır(Ünsal, 2016:11). Diğer taraftan ekonomik kalkınma, ekonomik büyümeyi de içinde barındıran daha kapsamlı bir tanımdır ve büyümeye ilave olarak ülke ekonomisindeki işsizliğin azaltılması, gelir dengesizliklerinin azaltılması, sosyal ve kültürel göstergelerin iyileştirilmesi gibi faktörleri de kapsamaktadır(Seyidoğlu, 2006: 829).

Özellikle gelişmekte olan ülkeler için turizm sektörü ekonominin gelişmesine, genel dengesini sağlamasına ve ödemeler dengesini sağlamasına pozitif katkı yaparak aktif rol oynamaktadır(Akın vd.,2012: 63). Gelişmekte olan ülkeler açısından

turizm sektörü ile ekonomik büyüme arasında pozitif ve anlamlı bir ilişki bulunmaktadır (Bahar ve Bozkurt, 2010: 255; Durgun Kaygısız, 2015: 162-163). Birçok gelişmekte olan ülkenin karşılaştığı döviz darboğazlarının aşılması konusunda turizm sektörü aracılığıyla elde edilen döviz gelirleri önemli bir yere sahiptir (Tutar ve Tutar, 2004:103). Ayrıca Turizm sektörü, konaklama, ulaşım, ticaret, sağlık ve bankacılık gibi ilgili ve ilişkili diğer sektörlerin gelişmesine de yayılma etkisi ile yardımcı olmaktadır (Topallı, 2015; 340, Balaguer ve Cantavella-Jorda, 2002: 877,878).

Turizm sektörü aracılığıyla ülke gelirlerini yükseltmek isteyen ülkeler kendilerine özgü kaynaklarına ve özelliklerine uygun turizm faaliyetleri geliştirmeyi tercih etmektedir. Bu kapsamda yaz turizmi, kış turizmi, sağlık turizmi, kültür turizmi, kongre turizmi, inanç turizmi, spor turizmi vb. gibi birçok farklı seçenek geliştirilmiş ve alt dallar oluşmuştur (Çatalbaş,2022:1496).

Turizm, hem gelişmiş ülkeler için hem de gelişmekte olan ülkeler için önemli bir ekonomik faaliyet olarak görülmektedir. Turizme verilen önemin artması ve dünya çapında buna eşlik eden teşvik politikaları, turizm sektörünün gelişmesine önemli bir ivme sağlamaktadır. Genel olarak dünya ekonomisinde turizm sektörünün gelişmesine yol açan başlıca faktörleri şu şekilde özetlenmektedir: hane halkı gelirlerinin yükselmesi, ulaşım olanaklarının gelişmesi, gelişmiş ülkelerde ücretli tatillerin süresinin artması, sanayileşme nedeniyle değişen toplum ve aile yapısı ve iletişim teknolojilerinde yaşanan gelişmeler. (Aktaş, 2005: 164).

Turizm Sektörü ve Türkiye Ekonomisi

Türkiye’de turizm sektörü özellikle 1980 sonrası dönemde hızlı bir gelişim göstermiştir (Recepoğlu, 2017: 1174). 1980 yılı sonrasında Türkiye ekonomisinde ithal ikameci sanayileşme politikalarının bırakılması ve ihracata dayalı sanayileşme politikalarının uygulanmaya başlamasıyla turizm sektörü verimli bir araç olarak kullanılmaya başlanmıştır (Erdil,2018:241). Türkiye ekonomisinde toplam ihracat gelirlerinde turizm sektörü imalat sanayiinin ardından ikinci sırada yer almaktadır ve bu durum ihracata dayalı büyüme politikaları açısından turizm sektörünün önemini göstermektedir. Akademik araştırmaların büyük çoğunluğu turizm gelirlerinin Türkiye’nin ekonomik büyümesini pozitif yönde etkilediğini belirtmektedir (Bal vd.,2016: 1). Bu bağlamda turizm sektörü ekonomik büyüme ve istihdam üzerindeki olumlu etkileri nedeniyle Türkiye’de kalkınma planlarında da geniş yer bulmuştur. Turizm sektörünün desteklenmesi ve geliştirilmesi iktisadi ve sosyal kalkınmanın temel amaçları arasında sayılmaktadır.

Türkiye ekonomisinde 1963 yılından başlayarak günümüze kadar on iki kalkınma planı uygulamaya konulmuştur. İlk dört kalkınma planı (1963-1983 yılları arası), turizm sektörü açısından kitle turizminin ön plana çıkarıldığı ve tanıtım faaliyetlerine, konaklama tesislerinin inşa edilmesine ve altyapı yatırımlarının yapılmasına vurgu yapıldığı dönemdir (Durgun Kaygısız, 2023: 127). Diğer taraftan 1980 yılı sonrasındaki dönemde birtakım mevzuat değişiklikleri yapılmış, teşvik politikaları uygulanmaya başlamış ve özel sektör desteklenmiştir (Kılınç, 2024:475). Turizm sektörünün Türkiye’de asıl yükselişi ve gelişimi 1982 yılında çıkarılan 2634 sayılı “Turizmi Teşvik Kanunu”ndan sonra olmuştur. Bu dönemden itibaren turizm sektörüne sağlanan yatırım teşvikleri ve mali destek önemli ölçüde artmıştır (Bahar, 2006:138). Bu süreç 2000’li yıllara kadar devam etmiştir. Son dönemlerdeki kalkınma planlarında ise ön plana çıkan başlıklar, turizmin çeşitlendirilmesi, sürdürülebilirlik, koruma-kullanma dengesinin sağlanması ve korunması, dijital dönüşümün sağlanması, nitelikli pazarlara ve turistlere ulaşılması gibi konulardır (Kılınç, 2024:475).

Tablo 1: Türkiye’ye gelen yabancı ve toplam ziyaretçi sayısı: 2019-2023 dönemi

	Yıllar						
	2019	2020	2021	2022	2023	2024	2028
Ziyaretçi sayısı	51860042	15826266	29357463	51369026	57077441	62232447	82 000 000
Turizm geliri (bin \$)	42851778	15169371	30309722	49857030	55874176	60497018	100 milyon
Kişi başı ortalama harcama (\$)	826	958	1032	971	979	972	1215

Kaynak: TÜİK Turizm İstatistikleri

Not: * 2028 yılına ait turizm hedeflerini göstermektedir. 12. Kalkınma planından temin edilmiştir.

Tablo 1, 2019 yılı sonrasında Türkiye’ye gelen yabancı ve toplam turist sayısını göstermektedir. 2019 yılında turist sayısı 51 milyona ulaşmış iken 2020 yılında pandeminin etkisiyle 15 milyona gerilemiştir. Aşıların ortaya çıkması ve kısıtlamaların kaldırılmasıyla birlikte 2021 yılında tekrardan canlanan turizm sektörü 2022 yılının sonunda hemen hemen pandemi öncesi dönemin turist sayısına ulaşmıştır. 2023 yılında 57 milyon kişiye, 2024 yılında ise 62 milyon kişi sayısına yükselmiştir. Turizm gelirleri de pandemi öncesinde yaklaşık 42 milyon dolar civarında iken, pandemi 15 milyon dolar seviyesine düşmüş, ardından pandemi sonrası dönemde 2023 yılında yaklaşık 55 milyon dolar, 2024 yılında 60 milyon dolar olarak gerçekleşmiştir. Kişi başına ortalama harcama miktarı da yıllar itibariye giderek artmaktadır. 2023 yılında 972 dolar olan kişi başına ortalama harcama miktarı, 2024 yılında 1215 dolara yükselmiştir. Bu tablodaki verilere baktığımızda Turizm sektörünün Türkiye ekonomisine pozitif katkısının artarak sürdüğü görülmektedir. Ayrıca turizm pandemiden en fazla etkilenen sektörlerden birisi olmakla birlikte (Durgun Kaygısız, 2021: 85), sonrasında da en çabuk

toparlanan sektörlerdendir. Tablo 1’de aynı zamanda 12. Kalkınma planında (12. Kalkınma planı, 2023: 109-112) yer alan turizmle alakalı hedefler de gösterilmiştir. 2028 yılında turist sayısının 82 milyon, turizm gelirlerinin ise 100 milyon olması hedeflenmektedir.

Metodoloji ve Yöntem

Bu çalışmanın amacı Türkiye’de en fazla turist çeken İstanbul, Antalya, Muğla, İzmir ve Aydın illeri için ekonomik büyüme ve turizm ilişkisini incelemektir. Özellikle bu illerin seçilmesinin nedeni hem en fazla turist ziyaret ettiği iller olması hem de turizm sektöründe daha ön planda olmalarıdır. Büyüme yi temsilen il bazında kişi başına düşen gayri safi yurt içi hasıla (KBGSYH), turizm talebini temsilen ise illere gelen toplam turist sayısı (TS) kullanılmıştır. Ayrıca 2020 yılında başlayan ve etkilerinin 2022 yılı sonuna kadar devam eden Covid-19 pandemisinin etkileri de modele kukla değişken olarak eklenmiştir. 2004-2023 yıllarını kapsayan çalışmada panel zaman serisi analizleri uygulanmıştır. Değişkenler TÜİK resmi internet sitesinden ve turizm databank sitesinden temin edilmiştir. Değişkenlerin logaritmaları alınarak modele dahil edilmiştir. Model aşağıdaki gibi kurulmuştur.

$$LNKBGSYH_{it} = \beta_0 + \beta_1 LNTS_{it} + \beta_2 PANDEMİ_{it} + u_{it}$$

Modeldeki i birim boyutunu, t ise zaman boyutunu temsil etmektedir.

Büyüme yi temsilen emek ve sermaye değişkenleri de modele dahil edilmek istense de il bazında veri yetersizliği nedeniyle dahil edilememiştir. Yine aynı nedenden dolayı seriler 2004 yılından başlatılarak 2023 yılına kadar oluşturulabilmiştir. Bunlar modelin kısıtlarını oluşturmaktadır. Bu kısıtlar dikkate alınarak sonraki süreçte çalışma tüm illeri kapsayacak şekilde genişletilebilir. Daha önceki yıllarda benzer çalışmalar (Karpat Çatalbaş, 2022; Zıldız ve Sarıtaş, 2021) bulunmakla birlikte verilerinin daha güncel olması, uygulanan yöntemlerin farklı olması ve seçilen örneklemin farklılığı nedeni ile diğer çalışmalardan ayrılmaktadır.

Analizler ve Bulgular

Panel veriler, yatay kesit ve zaman serisi verileri birleştirilerek oluşturulmaktadır. Panel analizlerle ilgili çalışmalar 1950’li yıllarda gündeme gelse de uygulamalı çalışmalar 1990’lı yıllardan sonra başlamıştır (Tatoğlu, 2021:3).

Homojenlik testi

Sabit ve eğim parametrelerinin birimlere göre homojen veya heterojen olması uygulanacak testler ve tahmin yöntemleri açısından önem arz etmektedir. Panel veri modellerinde eğim parametresinin birimlere veya zamana göre değerlendirildiği modellere heterojen modeller denilmektedir (Tatoğlu, 2023:119). Testlere başlamadan önce verilerin homojenliğini test etmek gerekmektedir.

Tablo 2: Swamy-S Homojenlik Testi

Chi2(12)	24.31
Prob> chi2	0.0185

Tablo 2 homojenlik test sonuçlarını göstermektedir. Buna göre Ho hipotezi reddedilmiş, parametrelerin homojen olmadığı birimden birime değiştiği kabul edilmiştir.

Birimler Arası Korelasyon Testi (Yatay Kesit Bağımlılığı Testi)

Oluşturulan seriler birimler arası korelasyon (yatay kesit bağımlılığı) içeriyor ise birinci kuşak birim kök testleri bu korelasyonu dikkate almadığı için uygulanamamaktadır. Birimler arası korelasyon içeren serilere ikinci kuşak birim kök testleri uygulanmalıdır. Bu nedenle birim kök testlerini tercih etmeden önce serilere yatay kesit bağımlılığı testi uygulanmalıdır. Literatürde bu amaçla yapılabilecek farklı testler olmakla birlikte burada Pesaran (2004) CD testi kullanılmıştır. Pesaran (2004), yatay kesit bağımlılığı testinde ADF regresyonu tahmininden elde edilen kalıntıları kullanmaktadır. Her bir birimin kendisi dışında kalan tüm birimlerle korelasyonunu hesaplamaktadır.

Tablo 3: Pesaran (2004) CD Testi- Ortalama Korelasyon Katsayıları

Değişkenler	CD-test	p-value	corr	abs(corr)
LKBKGSYH	12.26	0.0000	0.914	0.9114
LYTS	10.01	0.0000	0.746	0.746
Pandemi	13.42	0.000	1.000	1.000

Tablo 3 serilerin yatay kesit bağımlılığını göstermektedir. Hem LKBKGSYH hem de LTS değişkenleri için birimler arası korelasyonun olmadığını ifade eden Ho hipotezi reddedilmiş ve birimler arası korelasyon olduğu sonucuna ulaşılmıştır. Ortalama korelasyon katsayısı LKBGDP için %91, LTS için ise %74’dir. Bu durumda birim kök testleri için ikinci kuşak panel birim kök testleri tercih edilmelidir.

Panel Birim Kök Testi

Panel birim kök testleri birinci ve ikinci kuşak testlerden oluşmaktadır. Bu testler serilerin yatay kesit bağımlılığı içerip içermediğine dikkat edilerek uygulanmaktadır. Birinci nesil birim kök testleri yatay kesit bağımlılığını dikkate almazken ikinci kuşak birim kök testleri yatay kesit bağımlılığını dikkate almaktadır. İkinci kuşak panel birim kök testleri de birimler arası korelasyonu nasıl dikkate aldıklarına göre kendi içlerinde ayrılmaktadır (Tatoğlu, 2020, 107). Bu aşamada ikinci kuşak birim kök testlerinden yatay kesit bağımlılığını dikkate alarak, SUR tipi sistem tahminlerine dayanan Çok Değişkenli Genişletilmiş Dickey Fuller (MADF) panel birim kök testi uygulanmıştır. Bu testte $N < T$ koşulu bulunmaktadır (Tatoğlu, 2020:80).

Tablo 4: Çok Değişkenli Genişletilmiş Dickey Fuller (MADF) Panel Birim Kök Testi

Değişkenler	lags	MADF	Approx 5% CV
LKBSYH	1	42.432	49.619
LYTS	1	41.095	49.619

Tablo 4 MADF test sonuçlarını göstermektedir. Gecikme uzunluğu 1 olarak seçilmiştir. Bu testin temel hipotezi panele ait 5 zaman serisini tümünün (I) olduğu şeklinde kurulmuştur. Elde edilen sonuçlara göre her iki seri için de MADF test istatistiği verilen kritik değerden küçük olduğundan %95 güven düzeyinde H_0 hipotezi kabul edilmiştir. Her iki seride birim kök içermektedir.

Dumitrescu ve Hurlin (2012) Granger Nedensellik Testi

Durağan değişkenler arasındaki nedensellik ilişkisini test etmek için panel nedensellik testleri kullanılmaktadır. Uygulanacak olan nedensellik testi panelin homojen ya da heterojen olmasına göre değişmektedir. Elde edilecek sonuçlar bir değişkenden diğerine doğru olabileceği gibi çift yönlü de olabilmektedir. Çalışmadaki veriler heterojen bir yapıya sahip olduğu için Dumitrescu ve Hurlin heterojen panel nedensellik testi yapılmıştır. Gecikme uzunluğu AIC bilgi kriterine göre seçilmiştir.

Tablo 5: Dumitrescu ve Hurlin (2012) Granger Nedensellik Testi

Ho hipotezi	W-bar	Z-bar	p-value	Sonuç
Turist sayısı KBGSYH' nin nedeni değildir	7.1767	3.8128	0.0001	Red
KBGSYH turist sayısının nedeni değildir.	4.1560	0.1233	0.9018	Kabul
Pandemi turist sayısının nedeni değildir.	11.6486	6.0468	0.0000	Red
Turist sayısı pandeminin nedeni değildir.	25.3799	16.9023	0.0000	Red
KBGSYH pandeminin nedeni değildir	1.1229	-1.7135	0.0866	Kabul
Pandemi KBGSYH'nin nedeni değildir.	5.9284	7.7925	0.0000	Red

Tablo 5 nedensellik test sonucunu göstermektedir. Test sonuçlarına göre turist sayısı ve KBGYH arasında nedensellik olmadığını ifade eden H_0 temel hipotez reddedilmiştir. Buna göre turist sayısı KBGSYH'nin nedeni değildir. Pandemi ve turist sayısı arasında nedensellik olmadığını gösteren H_0 temel hipotezi de reddedilmiştir. Pandemi ve turist sayısı arasında karşılık nedensellik ilişkisi tespit edilmiştir. Son olarak pandeminin KBGSYH'nin nedeni olmadığını gösteren H_0 temel hipotezi de reddedilmiştir. Diğer bir deyişle pandemiden KBGSYH'ya doğru tek yönlü nedensellik ilişkisi tespit edilmiştir.

SONUÇ

Turizm sektörü sosyal, ekonomik, kültürel ve çevresel etkileri nedeni ile çok boyutlu bir sektördür. Birçok kaynakta turizm sektörünün 50 den fazla alt sektörle girdi çıktısı ilişkisinden söz edilmektedir. Turizm sektöründen elde edilen gelir çarpan etkisiyle diğer sektörlerle de yansımaktadır. Bununla birlikte belirli bir sezonda da olsa istihdam olanaklarını olumlu yönde etkilemektedir. Özellikle kıyı şeridindeki illerde yaz aylarında oluşan mevsimsel işsizlik turizm sektörü ile azaltılabilmektedir. Turizmin parasal etkileri bölgenin gelirini olumlu yönde etkilemektedir. Bu nedenle turizm ve büyüme ilişkisini araştıran çok sayıda çalışma bulunmaktadır. Fakat bu çalışmalar çoğunlukla Türkiye açısından ele alınmaktadır. İl bazında değerlendirilen çalışmalar bilindiği kadarıyla sınırlı sayıdadır. Bunun nedeni il bazında ulaşılabilen verilerin kısıtlı olmasıdır. Bu durum bu çalışmanın da kısıtını oluşturmaktadır.

Türkiye'ye gelen turistlerin büyük bir kısmı deniz turizmi için gelmektedir. Bu nedenle kıyı şeridi olan illerde turizm daha yoğun olarak yapılmaktadır ve turistler bu illeri daha çok tercih etmektedir. TÜİK verilerine göre kıyı şeridinde en fazla turist çeken iller Antalya, Muğla ve Aydın'dır. Bununla birlikte İstanbul ve İzmir gibi büyük şehirlerde turizm açısından önemli çekim merkezleridir. Bahsedilen iller de hem turizmden bağımsız hem de turizme bağımlı arz potansiyelinin yüksek olması nedeniyle önemli turistik mekanlardır. Dolayısıyla sanayi ve tarım sektörüne ek olarak turizm sektörü bu illerin büyümesinde önem arz etmektedir. Buradan yola çıkarak bu çalışmada Türkiye'nin en çok turist çeken beş ilinde turizm ve ekonomik büyüme ilişkisi panel veri analizi ile test edilmiştir. 2004-2023 yılları arasında kapsayan çalışma da KBGSYH ve illere gelen toplam turist sayısı değişkenleri ele alınmıştır. Covid-19 pandemisinin en fazla etkilediği sektörlerden birisinin turizm olduğu düşünülerek pandemi modele kukla değişken olarak eklenmiştir.

Yapılacak analizlere karar vermeden önce birimler arası korelasyon ve homojenlik testleri uygulanmıştır. Test sonuçlarına göre seriler birimler arası korelasyon içermektedir ve heterojen bir yapıya sahiptirler. Buradan hareketle ikinci kuşak birim kök testi uygulanmıştır. Birim kök test sonuçlarına göre iki seri de düzeyde birim kök içermektedir. Son olarak heterojen Dumitrescu ve Hurlin nedensellik testi uygulanmıştır. Elde ettiğimiz sonuçlar teori ile uyumlu olarak bulunmuştur. İllere gelen toplam turist sayısından illerde KBGSYH'ya doğru tek yönlü bir nedensellik tespit edilmiştir. Diğer bir değişle illere gelen turist sayısı illerdeki ekonomik büyümeyi etkilemektedir. Ayrıca pandemi döneminde yaşanan kısıtlamalar ve kapanmalar illerdeki turist sayısını oldukça etkilemiştir. Pandemi ve turist sayısı arasında karşılıklı nedensellik ilişkisi tespit edilmiştir. Ayrıca pandemi süresinde illerdeki KBGSYH da etkilenmiş ve aralarında tek yönlü nedensellik tespit edilmiştir. Tespit edilen nedensellikler; LTS → LKBGSYH, PANDEMİ → LTS, LKBGSYH ↔ PANDEMİ şeklindedir.

Turizm gelirlerinin bölgesel eşitsizliği giderici, ekonomik büyüme ve kalkınmayı destekleyici katkısı nedeni ile son yıllarda turizmin çeşitlendirilmesi ve 12 aya yayılması çalışmaları hızlanmıştır. Denize kıyısı olmayan şehirlerde, kültür, doğa, yayla, kongre, sağlık vb. alternatif turizm çeşitleri ile bölgesel kalkınma ve ekonomik büyüme desteklenmeye çalışılmaktadır. Covid-19 pandemisinin de etkisiyle kitlesel turizmden bireyselle geçiş ve doğa ile iç içe olma isteği gibi turizm sektöründe yaşanan dönüşümler bu oluşumu destekleyecektir. Bu durum dikkate alınarak bundan sonraki çalışmalar 81 ili kapsayacak şekilde genişletilebilir. Böylelikle turizmi önceliklemeyen illerde de turizm ve ekonomik büyüme ilişkisi araştırılmış olunacaktır.

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The Representation of Stylistic Analysis Elements in Neşet Ertaş's Folk Songs

HAYRETTİN YİĞİT*¹

Abstract: Stylistics is a branch of linguistics that examines the structure, language use, and semantic values of literary works to determine their literary qualities. This field aims to approach texts objectively and analyze their complex structures to reveal insights that enhance readers' perception, orientation, and experience. Stylistics consists of four main criteria: parallelism, repetition, foregrounding, and deviation. Among these, parallelism and repetition pertain to the structural aspects of a literary text, focusing on its composition and language use. On the other hand, foregrounding and deviation analyze the expressive characteristics of a literary work based on its meaning and emotional values. The Abdal community is one of the most unique groups in Anatolian musical civilization due to its distinctive oral tradition and rich cultural heritage. Spread across Anatolia, this community is a cultural treasure, distinguished by their simple way of life and their dedication to music as a profession passed down through generations. In Central Anatolia, Kırşehir serves as the most significant center where the social, cultural, religious, and economic characteristics of the Abdals can be observed. Neşet Ertaş is one of the last representatives of the Abdal tradition, which has flourished in Kırşehir for generations. Growing up in this cultural environment, he internalized the Abdal music tradition under the mentorship of his father, the late Muharrem Ertaş, through an apprentice-master relationship. He transformed ordinary sentences from daily language into profound and heartfelt expressions in his works, synthesizing linguistic, content, and structural elements. This study aims to analyze the compatibility of Ertaş's compositions with the criteria of stylistics in terms of phonetics, morphology, syntax, and meaning. Selected folk songs "Dertli Yoldaş, Yolcu, Muhabbet, and İki Büyük Nimetim Var" are examined based on their structural characteristics (parallelism and repetition) and semantic and emotional aspects (foregrounding and deviation).

Keywords: Linguistics, Stylistics, Abdal Tradition, Neşet Ertaş

Özet: Deyişbilim; edebî esere yazınsallık değeri veren kurgu, dil kullanımı ve anlam değerlerini araştırmak amacıyla dilbilim çalışmaları içerisinde yer bulan bir alandır. Bu alan, metne nesnel yaklaşmayı amaç edindiği gibi metnin karmaşık yapısını çözümleyerek okurun algı, yönelim ve yaşantılarını destekleyici sonuçlar ortaya koymaktadır. Koşutluk, yinleme, öneleme, sapma olmak üzere dört ölçütü vardır. Bunlardan koşutluk ve yinleme, bir yapı özelliği olarak edebî metnin kurgusu ve dil kullanımı ile ilgilidir. Öneleme ve sapma ise, bir anlatım özelliği olarak edebî eseri anlam ve duygu değerlerine göre ele alıp değerlendirmektedir. Abdallar, kendilerine has söyleyiş tarzlarıyla ve oluşturdukları zengin kültür mirası ile Anadolu müzik medeniyetinin en özgün topluluklarından biridir. Anadolu'nun dört bir yanına dağılmış olan bu topluluk sade yaşamlarıyla meslektan sanatkar olmaları ve bu mesleği kuşaklar boyu sürdürmeleriyle münhasır bir kültür hazinesidir. Orta Anadolu'da Abdalların; kendilerine özgü sosyal, kültürel, dinsel ve ekonomik tutum ve davranışlarının gözlemleneceği en önemli merkez Kırşehir'dir. Neşet Ertaş, Kırşehir'de dal budak salıp günümüze kadar gelen Abdallık geleneğinin son temsilcilerindendir. Doğduğu kültürel ortamın bir gereği olarak çocukluğundan itibaren babası merhum Muharrem Ertaş'tan usta-çırak ilişkisi içerisinde Abdallık geleneğini ve müziğini içselleştirmiştir. Gündelik dilde kullanılan sıradan bir cümleyi, yazmış olduğu eserlerinde derin ve içten bir anlatıma dönüştürmüş ve dil, içerik ve yapı unsurlarını sentezlemiştir. Bu çalışma, Ertaş'ın üstün yeteneği ve babasından öğrendikleri sonucunda yazmış olduğu eserlerin ses, biçim, sözdizimi ve anlam açısından deyişbilimin ölçütlerine uygunluğunu ortaya çıkarmak amacıyla yapılmıştır. Türküleri içerisinde belirlemiş olduğumuz *Dertli Yoldaş, Yolcu, Muhabbet ve İki Büyük Nimetim Var* adlı eserlerinin kurgusu ve dil kullanımı ile ilgili yapı özellikleri koşutluk ve yinleme; anlam ve duygu değerlerine yönelik anlam özellikleri de öneleme ve sapma ölçütüne göre incelenmiştir.

Anahtar Kelimeler: Dilbilim, Deyişbilim, Abdallık, Neşet Ertaş.

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1. GİRİŞ

Dil; aktarma ve dizge olarak, bir arada yaşayan ve sosyal bir varlık olan insanlar arasında bildirişim sağlama aracıdır. Tarihsel süreç içerisinde dış dünya ve beşerî gerçeklik ile ilişkilendirilmiş olan dilin, tarihsel gelişimi, düşünce, edebiyat ve anlamla ilişkisi her zaman araştırma konusu olmuştur (Çiçek, 2001: 194). Başlangıçta dil çalışmaları; felsefenin bir alt kolu olarak gelişmiş, özellikle Eski Hint ve Yunan Dönemi'nde eski metinlerin anlaşılmasını dil unsurlarını izah etmek amacıyla kullanılmıştır. 20. yüzyılın başlarında Saussure'nin çalışmalarıyla yeni bir boyut kazanmış; Avrupa'da, Amerika'da, Rusya'da, Çin'de bu disiplinle ilgili farklı ekoller, kuramlar ortaya çıkmıştır. Yapılan dilbilim çalışmaları insanı, içinde yaşadığı bu dünyayla birlikte her gün kullandığı dil fenomenini daha yakından doğru bir biçimde tanımayla, algılamayla ve anlamlandırmayla çalışmıştır (Çekin-Gören, 2013: 97). Dilbilimi içerisinde ortaya çıkan ekoller,

kuramlar farklı yöntemler izleyerek dilbilimini “ses boyutunda ses bilgisi ve sesbilim; biçim boyutunda biçim bilimi ve söz dizimi; anlam boyutunda anlambilimi, sözcük bilimi, sözlük bilgisi, ad bilimi ve köken bilimi; kullanım boyutunda metin dil bilimi, lehçe bilimi, toplum dil bilimi, uzam dil bilimi, budun dil bilimi, ruh dil bilimi, uygulamalı dil bilimi, edim bilimi/kullanım bilimi, insan bilimsel dil bilimi, beyin dil bilimi” alt başlıklara ayırmıştır (Bayraktar, 2014: 124).

Deyişbilim, edebî esere yazınsallık değeri veren kurgu, dil kullanımı ve anlam değerlerini araştırmak amacıyla dilbilim çalışmaları içerisinde yer bulan bir alandır. Biçembilim, üslupbilim, stilistik terimleriyle de karşılanmakta ve salt eser odaklı inceleme yapmaktadır (Özönlü, 1997: 63). Tarihsel süreç içerisinde Eski Yunan’dan 19. yüzyıl ortalarına kadar sözbilim (Retorik) in bir alt dalı olarak gelişmiştir. 1951’de C. Bally’nin *Traile de Stylistique Française* adlı kitabından sonra bağımsız bir bilim dalı olarak ele alınmaya başlamıştır. Aynı anda hem dilbilimsel hem de yazınsal eleştiriyi içeren deyişbilim, metne nesnel yaklaşmayı amaç edindiği gibi metnin karmaşık yapısını çözümleyerek okurun algı, yönelim ve yaşantılarını destekleyici sonuçlar ortaya koymaktadır. Deyişbilimin koşutluk, yinleme, önceleme, sapma olmak üzere dört ölçütü vardır. Bunlardan koşutluk ve yinleme, bir yapı özelliği olarak edebî metnin kurgusu ve dil kullanımı ile ilgilidir. Önceleme ve sapma ise, bir anlatım özelliği olarak edebî eseri anlam ve duygu değerlerine göre ele alıp değerlendirmektedir (Özönlü, 1997: 12).

Abdallık Geleneği Ve Neşet Ertaş (1938-2012)

Abdallar, kendilerine has söyleyiş tarzlarıyla ve oluşturdıkları zengin kültür mirası ile Anadolu müzik medeniyetinin en özgün topluluklarından biridir. Özel ve ayırt edici yaşam biçimleri; toplumsal ilişkileri, inanç sistemleri, âdet ve gelenekleri, manevi evrenleri içerisinde yarattıkları değer ve görüşler kendilerine özgü kültürlerinin ana kaynağıdır. Anadolu müzik medeniyetinin beslediği en önemli kaynakların başında gelen bu özgün topluluk; dört bir yanına dağıldıkları kültür zengini, bereketli Anadolu topraklarının müzik kültürünü sevgi, saygı, barış ve kardeşlik duygusuyla dolu engin gönülleri ile Hak yolunda çağlar boyu yeniden inşa etmişlerdir. Anadolu’ya has bir inanç ve görgü ile sürdürdükleri; abartıdan uzak, sade yaşamları boyunca, meslekten sanatkar olmaları ve bu mesleği kuşaklar boyu sürdürmeleri sonucu, gelişerek çoğalan münhasır bir kültür hazinesi oluşturmuşlardır (Parlak, 2012: 290).

Orta Anadolu’da abdalların, kendilerine özgü sosyal, kültürel, dinsel ve ekonomik tutum ve davranışlarının tipik olarak gözlemleneceği en önemli merkez Kırşehir’dir. Kırşehir’de yaşayan abdallarla Kaman, Kırıkkale merkez ve Keskin, Nevşehir-Hacıbektaş, Ankara-Polatlı, Gölbaşı Soğulcak köyü ve Haymana’da yaşayan abdallar arasında geçmişe dayanan bir ilişki vardır. (Gürsoy, 2006: 9-10). Günümüzde Kırşehir abdalları, merkezde Bağbaşı ve Aşıkpaşa Mahalleleri ile Kaman ilçesinde belli bir nüfus yoğunluğuna sahip olarak yaşamaktadırlar. Çevre illerle birlikte yoğun bir Türkmen nüfusunu bünyesinde barındıran Kırşehir, bu göçebe Türkmen aşiretlerinin Orta Asya’dan getirdikleri saf şiir ve müzik kültürünün abdallar vasıtasıyla yaşatıldığı en önemli merkezlerden biridir (Tokel, 2004: 15).

Neşet Ertaş, kökleri Orta Asya’ya dayanan XI. yüzyıldan itibaren Anadolu’da gelişip günümüze kadar gelen müessesleşmiş abdallık geleneğinin içine doğmuştur. Doğduğu kültürel ortamın bir gereği olarak çocukluğundan itibaren babası merhum Muharrem Ertaş’tan usta-çırak ilişkisi içerisinde abdallık geleneğini ve müziğini içselleştirmiştir. Neşet Ertaş’ın içine doğduğu doğal konservatuvar ortamı ve Tanrı tarafından verilen üstün yetenekler onu Türkmen/Abdallık kültürünün ve müzik geleneğinin son büyük temsilcisi yapmıştır. "Bozkırın Tezenesi, Garip" mahlaslarıyla icra ettiği müziği, onun inceliklerini tüm sevenlerine ulaştırma gayreti içerisinde olmuştur (Bekki, 2012: 11). Gelenekten öğrendiklerini kendi sanatçılık kapasitesiyle birleştirmek suretiyle ortaya koyduğu sanatıyla Türk halk müziğinin geniş kitlelerce tanınmasına, takip edilmesine ve sevilmesine katkıda bulunmuştur (Keskin, 2013: 110).

1. Neşet Ertaş Türkülerinin Deyişbilimsel Çözümlemesi

Deyişbilim sanat eserlerinin çözümlemesinde sesbilgisi, biçimbilgisi, sözdizim ve anlambilimsel açılardan bütüncül, akılcı ve açık bir temel sunmaktadır. Metin çözümlemesi yaparken bütün dilbilim kuramlarını ve yöntemlerini kullanarak metindeki yazınsal değerleri ortaya çıkarmaktadır. Elde ettiği tüm verileri yazınsal metnin yorumlanmasında ve anlamlandırılmasında kullanmaktadır (Özönlü, 2001: 42).

Neşet Ertaş; bir türküyü söz, ezgi ve mana bakımından bir bütün olarak ele alıp sağlam bir akıl, mantık ve duygu süzgecinden geçirerek âdeti bir ses mühendisi gibi en ince ayrıntısına kadar irdeleyen, aksayan kısımları doğrularıyla değiştirebilen, kendince ifade edebilme başarısını gösterebilen bir yorumcudur. Yöresinin kendinden önceki hemen tüm ezgilerine el atmış ve onları yeni baştan inşa etmiştir. Kenarda köşede kalmış küçük ezgiler bile Ertaş yorumu ile görkemli türkölere dönüşmüştür. Geleneği, halk edebiyatını, Türk dilinin inceliklerini ve halkın duygularını iyi tanıması nedeniyle, ülkemiz müzik kültürünün en seçkin örnekleri arasında yer almış; birbirinden değerli çok sayıda eser üreten bir türkölü yakıcısı olmuştur (Parlak, 2012: 293).

Gündelik dilde kullanılan sıradan bir cümleyi yazmış olduğu eserlerinde derin ve içten bir anlatıma dönüştürmüş; dil, içerik ve yapı unsurlarını sentezlemiştir. Bu nedenle eserleri ses, biçim, sözdizimi ve anlam açılarından incelenmelidir. Nitel araştırma doğası içinde gerçekleştirilmiş olan bu çalışmada, doküman analizi kullanılmıştır. Bu yöntem, araştırılması hedeflenen olgular hakkında bilgi içeren yazılı materyallerin analizini kapsamaktadır (Yıldırım ve Şimşek,

2018: 191). Yazılı dokümanların incelenmesi betimsel analiz yöntemiyle kavramlar betimlenmiş ve yorumlanmıştır. Neşet Ertaş'ın türkülerinden dört tanesi deyişbilimin yapı özelliğine yönelik koşutluk, yineleme ve bir anlatım özelliği olarak öneleme, sapma unsurlarına göre değerlendirilmiştir.

Dertli Yoldaş

Ey Garip gönüllüm, dertli yoldaşım
Niye belli değil, baharın, kışın
Var mıdır sormazlar, ekmeğin, aşın
Zengin isen ya bey derler, ya paşa
Fukara isen ya Abdal derler ya Cingan haşa

Kim onun halını sormuş demezler
Cahilin gözünde hormuş demezler
Gariplere kim iş vermiş demezler
Zengin isen ya bey derler, ya paşa
Fukara isen ya Abdal derler ya Cingan haşa

Sen de bir insansın, insanlar gibi
Haksız kazanç ile sürmedin demi
İnsanlığın kuralları böyle mi
Zengin isen ya bey derler, ya paşa
Fukara isen ya Abdal derler ya Cingan haşa

O Hak'ı tanımaz, kul kandıranlar
İnsanlığın ne olduğun ne anlar
İnsanlık varlıkla olur sananlar
Zengin isen ya bey derler, ya paşa
Fukara isen ya Abdal derler ya Cingan haşa

Boş durmak günahdır, çalışmak sevap
Çalış ne duruyon, sen de bir şey yap
Çoğalır yoldaşım, gör nice ahbab
Zengin isen ya bey derler, ya paşa
Fukara isen ya Abdal derler ya Cingan haşa

Garibim engin ol, uyma cahile
Şeytanın kazancı nafiye, hile
Sana ad takarlar, üzölme bile
Zengin isen ya bey derler, ya paşa
Fukara isen ya Abdal derler ya Cingan haşa

Muhabbet

Gelin dostlar gelin muhabbet edek
Hak muhabbettendir muhabbet Hak'tan
Biz de bilenlerin yolundan gidek
Hak muhabbettendir, muhabbet Hak'tan

Muhabbetle dost yanına varılır
Muhabbetle dost cemali görülür
Muhabbetle can alınır verilir
Hak muhabbettendir, muhabbet Hak 'tan

Muhabbettir yerin göğün direği
Aşk olmanın yanmaz yüreği
Muhabbettir yakın eden ırağı
Hak muhabbettendir, muhabbet Hak'tan

Garibim muhabbet Hak 'tır, Hak olur
Muhabbet edenler paktır, pak olur
Muhabbetin nimetleri çok olur
Hak muhabbettendir, muhabbet Hak 'tan

Yolcu

Bir anadan dünyaya gelen yolcu
Görünce dünyaya gönül verdin mi
Kimi böyü kim böcek kimi gurt
Marak edip heç birini sordun mu
Bunlar neden nedenini sordun mu

İnsan ölür ama uruhu ölmez
Bunca mahlukat var heç biri gülmez
Cehennem azabı zordur çekilmez
Azap çeken hayvanları gördün mü
Azap çeken hayvanları gördün mü

İnsandan doğanlar insan olurlar
Hayvandan doğanlar hayvan olurlar
Hepisi de bu dünyaya gelirler
Ana haktır sen bu sırra erdin mi
Ana haktır sen bu sırra erdin mi

Vade tekmi olup ömrün dolmadan
Emanetçi emanetini almadan
Ömrüyün bağının gülü solmadan
Varıp bir canana ikrar verdin mi
Varıp bir cananın kulu oldun mu

Garip bülbül gibi feryat ederiz
Cehalet(cahill) elinde küskün kederiz
Hep yolcuyuz böyle gelir gideriz
Dünya senin vatanın mı yurdun mu
Dünya senin vatanın mı yurdun mu

İki büyük nimetim var

İki büyük nimetim var
Biri anam biri yârim
İkisine de hürmetim var
Biri anam biri yârim

Ana deyip de geçilmez
Yar anadan seçilmez
İkisine de kıymet biçilmez
Biri anam biri yârim

Birisi var etti beni
Birisi yar etti beni
İkisinin de birdir teni
Biri anam biri yârim

Garib'im halını bildir
Hikmetleri gizli sırdır
İkisinin de kalbi birdir
Biri anam biri yârim

2.1. Kurgu ve Yapı Taslakları

2.1.1. Yineleme

Coşku ve heyecana bağlı metinlerde ses ve ahenk iki önemli unsurdur. Estetik bir güzellik oluşturmak, şiirsel ritmi yakalamak, anlamı vurgulamak ve yeni çağrışımlar yaratmak amacıyla ses ve sözcüklere dayalı farklı kullanımlar şairler tarafından uygulanmaktadır. Yinelemelerde şiirin bağlamında herhangi bir dilbilimsel öğeyi yinelemek suretiyle kullanılmaktadır. Sözlü kültür ürünlerinde bellekte kalıcılığı sağlamak amacıyla kullanılan bu yapılar modern metinlerde de ezgisel etki ögesi olarak kullanılmaktadır (Aksan, 2013: 203). Sözcüğün yinelenmesi aslında seslerin de yinelenmesidir. Biçimbirimsel ve anlam birimsel yinelemeler olarak iki grupta incelenmektedir.

2.1.1.1. Biçimbirimsel Yinelemeler

Biçimbirimsel yinelemenin odağında sözcük vardır. Bir bütün içerisinde sözcüklerin aldıkları eklere, taşıdıkları değerlere ve şiir içindeki konumlarına göre biçimbirimde çeşitli yinelemeler oluşur. Bu yinelemeler ön yineleme, art yineleme, ek yinelemesi, ikizleme, bağlaç yinelemesi, çok ekli yineleme gibi terimlerle kavramlaştırılmıştır (Özünü, 2011: 117). Genel olarak Türk şiirinde karşılaşılan biçimbirimsel yineleme örnekleri halk şiirinde de sıkça kullanılmaktadır.

1.1.1. Ek Yinelemesi

Biçimbirimsel bir yineleme türü olarak, aynı yapıyı ya da çekim ekinin başka başka sözcüklerle kullanılmasıdır (Özünü, 2001: 122). Aşağıdaki *Dertli Yoldaş* türküsünün ilk dördlüğünün ikinci ve üçüncü mısralarında “-In” iyelik eki; ikinci dördlükte ise “-mı” haber kipi “demezler” sözcüğüyle birlikte kullanılarak paralel bir şekilde yinelenmiş ve ahenk unsuru olarak kullanılmıştır:

Ey Garip gönüllüm, dertli yoldaşım
Niye belli değil, baharın, kışın
Var mıdır sormazlar, ekmeğin, aşın
Zengin isen ya bey derler, ya paşa
Fukara isen, ya Abdal derler, ya Cingan haşa

Kim onun halını sormuş demezler
Cahilin gözünde hormuş demezler
Garip'lere kim iş vermiş demezler
Zengin isen ya bey derler, ya paşa
Fukara isen, ya Abdal derler, ya Cingan haşa

Yolcu türküsünde ek halinde yinelemeler kullanılmıştır. Aşağıdaki ilk bentte “-mAz” geniş zaman olumsuzluk eki ilk üç mısradan yinelenirken diğer bentlerin nakarat kısımlarında “-dİ” haber kipi, “-n” şahıs eki ve “mİ” soru edatı birlikte kullanılmak suretiyle ahenk unsuru olmuşlardır:

İnsan ölür ama uruhu ölmez
Bunca mahlukat var heç biri gülmez
Cehennem azabı zordur çekilmez
Azap çeken hayvanları gördün mü
Azap çeken hayvanları gördün mü

İnsandan doğanlar insan olurlar
Hayvandan doğanlar hayvan olurlar
Hepisi de bu dünyaya gelirlir
Ana haktır sen bu sırta erdin mi
Ana haktır sen bu sırta erdin mi

1.1.2. Bağlaç Yinelemesi

Şiirde aynı türden veya başka türden bağlaçlar kullanmak biçimbirimsel bir yineleme türüdür (Özünü, 2001: 17). Bağlaç yinelemesi ile eş görevli ögeler arasında aynı bağlaç tekrarlanarak bu ögeler arasında anlamsal bir bütünlük oluşturulmaktadır. Ertaş, *Dertli Yoldaş* türküsünün nakarat kısmında zengin ve fakir karşılaştırması yaparken “ya...ya” tekrarlı bağlacı kullanarak anlam akışını sağlamıştır. Halk nazarında zenginlik ve fakirliğe bakış açısını sunmuştur. Zengine dair ifadelerde “ya...ya” bağlacı ile olumlu ve yüceltici kavramlar bağlanmış; fakirlikle ilgili olarak da olumsuz ve küçümseyici ifadeler bağlanmıştır:

Zengin isen ya bey derler ya paşa
Fukara isen ya Abdal derler ya Cingan haşa

Yolcu türküsünde ise “kimi” bağlacı tekrarlı bağlaç olarak kullanılmıştır. Söylemin çeşitliliğini arttırarak eş görevli sözcüklerle anlatımı pekiştirip güçlendirmek amacıyla üçüncü mısradaki bağlaç yinelemesine başvurmuştur:
Bir anadan dünyaya gelen yolcu
Görünce dünyaya gönül verdin mi
Kimi böyü **kimi** böcek **kimi** gurt
Marak edip heç birini sordun mu
Bunlar neden nedenini sordun mu

1.1.3. Ön Yineleme

Bıçimbirimsel bir yineleme türü olan ön yineleme, birbiri peşi sıra gelen tümcelerin baş taraftaki sözcük ya da sözcük gruplarının yinelenmesi (Özünü, 2001: 118) şeklinde ifade edilmektedir. Şiirde ahengi artıran bu kullanım biçiminde yineleme pekiştireç görevi de görmektedir.
Muhabbet türküsünde Ertaş, Hakk’ın muhabbetle bulunabileceğine inanmakta ve bilgiye giden yolunda muhabbetten geçtiğini düşünmektedir. Bu nedenle türküsünde ana tema olarak verilen “Muhabbet, Hak, dostluk” kavramları yinelenen kavramlar olmuştur. Ön yinelemeler şiirin dörtlükleri içerisinde karşımıza çıkmaktadır:

Gelin dostlar gelin muhabbet edek
Hak muhabbettendir muhabbet Hak’tan
Biz de bilenlerin yolundan gidek
Hak muhabbettendir, muhabbet Hak’tan

Muhabbetle dost yanına varılır
Muhabbetle dost cemali görülür
Muhabbetle can alınır verilir
Hak muhabbettendir, muhabbet Hak ‘tan

Ertaş, anayı “yaratan can” gören *İki Büyük Nimetim Var* türküsünde ana ve yâre verdiği değeri göstermek amacıyla “iki ve biri” kavramlarını ön yineleme olarak kullanmıştır. Ertaş’ın felsefesi; ananın insanın aslı olduğu inancıdır ve ana ile eş saygı duyulması gereken iki büyük nimettir:

İki büyük nimetim var
Biri anam biri yârim
İkisine de hürmetim var
Biri anam biri yârim

Birisi var etti beni
Birisi yâr etti beni
İkisinin de birdir teni
Biri anam biri yârim

1.1.4. Art Yineleme

Birbiri peşi sıra gelen tümce sonundaki sözcüklerin veya sözcük gruplarının yinelenmesidir (Özünü, 2001: 118). Mısra sonlarında yapılan bu tekrarlar ahengi sağlayan en önemli unsurlardır.

Ertaş, *Dertli Yoldaş* türküsünün ikinci dörtlüğünde “demezler” sözcüğünü; *Muhabbet* türküsünde “olur” sözcüğünü art yineleme olarak kullanarak ahengi sağlamıştır:

Kim onun halını sormuş **demezler**
Cahilin gözünde hormuş **demezler**
Garip’lere kim iş vermiş **demezler**
Zengin isen ya bey derler, ya paşa
Fukara isen, ya Abdal derler, ya Cingan haşa

Garibim muhabbet Hak ‘tır, Hak **olur**
Muhabbet edenler paktır, pak **olur**
Muhabbetin nimetleri çok **olur**
Hak muhabbettendir, muhabbet Hak ‘tan

1.1.5. Metinsel Yinelemeler

Metinsel yinelemeler başlığında ihtiyaç duyulan yinelemeler “nakarat” bölümleridir. Kavuştak da denen bu bölümler her zaman tam bir cümle hâlinde bulunmayabilir. Nakaratlar, sözcük öbeklerinden başlayarak cümle yinelemesine, dize yinelemesine ve daha da ileri giderek birden fazla dize yinelemesine kadar uzanabilmektedir (Özünlü, 2001: 126). Ertaş, türkülerinde cümle düzeyinde nakarat kısımlarını dörtlüklerin sonlarında tekrarlayarak vermiştir. Bu sayede vermek istediği mesajları okuyucu/dinleyiciye aktarmıştır.

Dertli Yoldaş türküsünde;
Zengin isen ya bey derler, ya paşa
Fukara isen, ya Abdal derler, ya Cingan haşa

Yolcu türküsünde;
dünya senin vatanın mı yurdun mu
dünya senin vatanın mı yurdun mu

Muhabbet türküsünde;
Hak muhabbettendir, muhabbet Hak’tan

İki Büyük Nimetim Var türküsünde;
Biri anam biri yârim

1.2. Anlambilimsel Yinelemeler

Anlambilimsel yinelemeler bir yapıtta verilmek istenen mesaja yönelik mevcut anlamın yinelenmesiyle oluşmaktadır. Bu yinelemeler eş söz kullanımı, çift anlamlılık ve ortaya atılan tezin metin içerisinde tekrarlanmasıyla oluşmaktadır. Kurgulanmış yapıda anlam doğrudan ifade edilmemektedir. Anlam bir yanda yapının diliyle öte yanda yapının içinde olmayan ama yapının gerçekleşmesi için gerekli olan bağlamlar arasında sürekli bir gidiş gelişlerle metnin geneline işlenmiştir (Todorov, 2001: 10). Dolayısıyla bir dil teknisyeninin anlamı olduğu gibi açıklaması ya da açığa çıkarması gerekmez. Burada olan şey mevcut iletiyi anlamı destekleyici biçimde pekiştirmektir.

Ertaş’ın *Yolcu* türküsünün tamamında çok tutarlı bir bütünsellik hâkimdir. Yolcu metaforuyla ruhlar âleminde dünyaya oradan da ahirete giden bütün canlılar kastedilmiştir. İnsan, böyü, böcek, kurt yolcu benzetmesiyle ortaklık taşımaktadır. Ertaş, nakarat kısımlarında soru cümleleriyle hayatı ve insanlığı sorgulamaya davet ederek her dörtlüğün sonunda anlamsal yinelemeleri tezin metin içerisinde tekrarlanmasını sağlamıştır. Destekleyici pekiştirici olarak “mI” soru edatını tekrarlayarak bağdaşıklık hâkim olmuştur. Olumsuz nitelikler yüklenen kişinin özellikleri farklı örneklerde yinelenmiştir. Eğer şiir bir zincire benzetilirse kavramlar halka görevinde kullanılmıştır:

Bir anadan dünyaya gelen **yolcu**
Görünce dünyaya gönül verdin mi
Kimi böyü kim böcek kimi gurt
Marak edip heç birini sordun mu
Bunlar neden nedenini sordun mu

Yine başka bir dörtlükte ölüm kavramı “*Vade tek mil olup ömrün dolmadan/ Emanetçi emanetini almadan/ ömrüyün bağının gülü solmadan*” dizelerinde farklı metaforlarla ifade edilerek verilmek istenen mesaj dörtlük içerisine yayılmıştır. Ölüm gelmeden bir sevgiliye gönül verilmesini nakarat kısmında belirterek anlamsal yinelemeyi temayla bütünleştirmiştir:

Vade tek mil olup ömrün dolmadan
Emanetçi emanetini almadan
Ömrüyün bağının gülü solmadan
Varıp bir canana ikrar verdin mi
Varıp bir cananın kulu oldun mu

Dertli yoldaş türküsünün nakarat kısımlarında zengin ve fakir kavramları eş söz kullanımıyla “bey, paşa” ve “abdal, cingan” kavramlarıyla denk tutulmuş ve çağrışımsal ilişki kurulmuştur.

Zengin isen ya bey derler, ya paşa
Fukara isen, ya Abdal derler, ya Cingan haşa

İki büyük nimetim var türküsünde ise “nimet” metaforu “ana ve yâr” kavramlarını karşılamaktadır. Ayrıca sayı olarak kullanılan “iki” sözcüğü belgisizlik anlamı veren “biri” sözcüğü “ana ve yâr” sözcüklerine türkü genelinde göndermede

bulunmakta bu sayede sözcükler türkü boyunca yinelenmektedir. Türküde “ana ve yârin kutsallığını ve kıymetini” anlatmak amacıyla “nimet, iki, biri” sözcükleri eş söz yinelenmesiyle çağrışımda bulunmaktadır.

İki büyük **nimetim** var
Biri **anam** biri **yârim**
İkisine de hürmetim var
Biri anam biri yârim

1.2. Koşutluk

Şiirlerdeki akıcılığın, sürükleyiciliğin oluşmasında önemli unsurlardan biri de koşutluktur. Koşutluk (Paralelizm); birbiriyle bağıntılı sözcükler, sözcük öbekleri ve tümceler arasındaki yapı benzerliğidir. Bir şiirde şiirin geneline hâkim olan düzendir. Yineleme, öceleme ve sözlüksel alan ilişkileriyle yapılmaktadır. Yinelemeler, temanın dizelerde yinelenmesiyle ön yineleme veya mısra sonlarında yapılan art yinelemelerle, sözcüğün aynı biçimsel yapıda kullanılmasıyla, cümlelerin aynı çekimde sonlandırılmasıyla koşutluk ölçütünü sağlamaktadır. Koşutluk noktalamada da görülebilir. Şiirin tamamında sistemli bir şekilde tekrar eden noktalamalar da koşutluğa neden olabilir (Özünlü, 2001: 114).

Ertaş’ın türkülerinde ölçü ve uyağın kullanımı nakarat kısımlarının bulunması koşutluk ilişkisinin olduğunu göstermektedir. Sözcükler arasındaki anlam ve yapı paralelliği şiirin etki gücü ile akılda kalıcılığını arttırmış, şiirin kolay hatırlanmasını sağlamıştır. Ertaş’ın söz yazarı olarak üslubunun oluşmasında ve Ertaş’a ait bir eserin hemen anlaşılmasında koşutluğa bağlı kullandığı yapı ve anlam birlikteliği temanın aynı paralellikte türkünün genelinde anlatılması önemli bir unsurdur.

Aşağıda üzerinde inceleme yaptığımız dördlüklerde *Dertli Yoldaş* türküsünde Abdallar arasında Çingenelere yönelik gelişen genel tavra da karşı çıkarak asıl olanın insan olduğu inancını vurgulamıştır. Mısra sonlarında uyak ve redifin kullanılması, “demezler” sözcüğüyle art yinelemenin yapılması ve nakarat kısmının dördlük sonunda mısra tekrarı koşutluğunu sağlamıştır. Nakarat kısmında “ya...ya” bağlacı da kullanılmıştır. Anlamsal olarak fakir ile zenginin karşılaştırılması da anlamsal koşutluğu sağlamıştır.

Kim onun halını sormuş demezler
Cahilin gözünde hormuş demezler
Garip’lere kim iş vermiş demezler
Zengin isen ya bey derler, ya paşa
Fukara isen, ya Abdal derler, ya Cingan haşa

Yolcu türküsünde insanın yolcuğunu anlatırken alınan dördlükte ise yine uyak ve rediflerin bulunması sözdizimsel koşutluğu; nakarat kısımlarında istifham (soru sorma) sanatıyla anlamsal koşutluğu sağlamıştır.

İnsandan doğanlar insan olurlar
Hayvandan doğanlar hayvan olurlar
Hepisi de bu dünyaya gelirler
Ana haktır sen bu sırta erdin mi
Ana haktır sen bu sırta erdin mi

Muhabbet türküsünde bilgiye giden yolda arifler ve âlimler meclisinde dostlarla birlikte muhabbet edilmesi kişiyi Hak yolunda üstün kılacağını ifade edilirken “muhabbet” ve “Hak” sözcüklerinin yinelenmesi koşutluğu sağlamıştır:

Gelin dostlar gelin muhabbet edek
Hak muhabbettendir muhabbet Hak’tan
Biz de bilenlerin yolundan gidek
Hak muhabbettendir, muhabbet Hak’tan

İki büyük nimetim var türküsünde ana ve yârin kutsallığından bahsederken ölçü, uyak, redif, nakaratlarla yapılan vurgularla, yinelemelerle koşutluk ilkesini sağlamıştır:

Birisi var etti beni
Birisi yâr etti beni
İkisinin de birdir teni
Biri anam biri yârim

1.3. Önceleme

Şiir dili, günlük dilden farklı özelliklere sahiptir. Şairler, günlük dilde kullandıkları sözcüklerin çağrışım gücünü, anlamsal yoğunluğunu, vurucu yanını şiirle ortaya çıkarmaktadır (Gökalp Alpaslan, 2010: 216). Bir anlatım biçimi olarak yinelenmeler ve öncelemeler şiir dilinde sözcüklerin diğer kullanımlarının ortaya çıkmasını sağlayan önemli unsurlardır. Şiir dilini günlük dilden ayıran en belirgin özelliklerden olan önceleme, cümlede ve anlatımda herhangi bir dil ögesinin olağan yerinden daha önce kullanılmasıyla ya da bir metin içindeki anlatımda, hemen her yerde öncelenen ögeye yer verilerek yapılmaktadır (Özünü, 2001: 74). Öncelemeler “görsel, sözdizimsel öncelemeler ve anlam öncelemeleri” olmak üzere üç başlıkta incelenmektedir.

1.3.1. Sözdizimsel Öncelemeler

Sözdizimsel öncelemede, şiirin yüzeysel yapısında kullanılan sözcüklerin sıralaması dikkate alınmaktadır (Özünü, 2001: 98). Şair, kesin kurallara bağlı kalmadan çağrışım ve anlam yoğunluğuna bağlı olarak dil oyunlarına başvurur (Gökalp, 2012: 31-32). Sözdizimsel öncelemelerde kullanılan devrikleme ve eksiltmeler de bu biçimlerden (Öztekin, 2001: 75). Ertaş’ın türkülerinde ölçü ve uyağın kullanımı, nakarat kısımlarının bulunması koşutluk ilişkisinin olduğunu göstermektedir. Sözcükler arasındaki anlam ve yapı paralelliği şiirin etki gücü ile akılda kalıcılığını arttırmış şiirin kolay hatırlanmasını sağlamıştır. Bu örnekleri şu başlıklar altında sıralamak mümkündür:

Yüklem Öncelemesi Yoluyla Devrikleme

Yüklemi mısraların başına alarak vurguyu yüklem üzerinden yapmaktadır. *Dertli Yoldaş* türküsünün ilk dördlüğünün 3. mısrasında; *Muhabbet* türküsünün ikinci dördlüğünün 3. mısrasında, üçüncü dördlüğünün 1 ve 3. mısralarında yüklem öncelemesi yoluyla devrikleme yapılmıştır:

Ey Garip gönüllüm, dertli yoldaşım

Niye belli değil, baharın, kışın

Var mıdır sormazlar, ekmeğin, aşın

Muhabbettir yerin göğün direği

Aşk olmanın yanmaz yüreği

Muhabbettir yakın eden ırağı

Hak muhabbettendir, muhabbet Hak’tan

Muhabbettir yerin göğün direği

Aşk olmanın yanmaz yüreği

Muhabbettir yakın eden ırağı

Hak muhabbettendir, muhabbet Hak’tan

Belirtili Nesne Öncelemesi

Vurgu, belirtili nesnelerin mısra başında öncelenmesi suretiyle yapılmıştır. Ertaş, *Muhabbet* türküsünün üçüncü dördlüğünün 3. mısrasında, *İki Büyük Nimetim Var* türküsünün dördüncü dördlüğünün 2. mısrasında nesne öncelemesi yapmıştır:

Garibim muhabbet Hak ‘tır, Hak olur

Muhabbet edenler paktır, pak olur

Muhabbetin nimetleri çok olur

Hak muhabbettendir, muhabbet Hak ‘tan

Garib’im halını bildir

Hikmetleri gizli sırdır

İkisinin de kalbi birdir

Biri anam biri yârim

Ulaş (Bağ-fil) Öncelemesi

Vurgu, ulaşların mısra başında öncelenmesi suretiyle yapılmıştır. Ertaş, *Yolcu* türküsünde ulaş öncelemesi yapmıştır:

Bir anadan dünyaya gelen yolcu

Görünce dünyaya gönül verdin mi

Varıp bir canana ikrar verdin mi

Varıp bir cananın kulu oldun mu

“Ey” Nidâsının Öncelenmesi

Ey Garip gönüllüm, dertli yoldaşım

Niye belli değil, baharın, kışın
Var mıdır sormazlar, ekmeğin, aşın

Soru Edatı ve Soru Sözcüklerinin Öncelenmesi

Ey Garip gönüllüm, dertli yoldaşım
Niye belli değil, baharın, kışın
Var mıdır sormazlar, ekmeğin, aşın

Kim onun halını sormuş demezler

Cahilin gözünde hormuş demezler
Garip'lere kim iş vermiş demezler

1.3.2. Anlam Öncelemeleri

Şiir dilini günlük konuşma dilinden ayıran özellikler, öncelemenin şiir dilinde daha çok kullanılmasından kaynaklanmaktadır. Şiirde ses ya da anlamla ilgili olarak etki sağlayan öğelerin kimi zaman biri kimi zaman birkaçı birden öncelenebilir. Şiir dilinde anlamın ortaya çıkmasında somut olarak kullanılan sözcükler dil dizgesindeki diğer sözcüklerle farklı bağlantılarla başka anlamlara geçmektedir. Her sözcük; akla gelen ilk anlamının dışında farklı anlamlara gelecek şekilde kullanılmaktadır (Aksan, 1995: 45-46). Bu kullanımlardan biri olan anlam öncelemeleri; stilistik bakımdan söz sanatlarının imkânlarından faydalanmaktadır.

1.3.2.1. Eğretilen / Deyim Aktarması / İstiare

Benzetmenin temel öğelerinden birinin (benzetilen ya da kendisine benzetilen) söylenmesiyle yapılan benzetmedir. Eğretilen öğeler birbirlerine tam olarak benzemezler. Fakat taşıdıkları ortak niteliklerle birbirlerini çağrıştıracak şekilde karşılarlar. Eğretilenin açık ve kapalı olmak üzere iki çeşidinden bahsedilebilir. Ertaş, *Yolcu* türküsünde insanı bülbüle benzetmiş ancak insanı söylememiştir. Sadece kendisine benzetilen kullanıldığı için açık istiare.

garip bülbül gibi feryat ederiz
cehalet(cahiller) elinde kışkır kederiz
hep yolcuyuz böyle gelir gideriz

“Emanetçi emanetini almadan” derken emanetçi Allah’tır, emanet ise candır. Burada da açık istiare vardır:

Vade tekmi olup ömrün dolmadan
Emanetçi emanetini almadan
Ömrünün bağının gülü solmadan
Varıp bir canana ikrar verdin mi
Varıp bir cananın kulu oldun mu

1.3.2.2. Karşıtlam / Tezat

Birbiriyle çelişkili kavram veya sözcükler bir arada kullanılır. Ertaş, *Dertli Yoldaş* türküsünün beşinci dördlüğünde çalışmanın öneminden bahsederken günah ve sevap kavramlarını yine türkünün nakarat kısımlarında zengin ve fakara (fakir) kavramlarıyla vererek tezatlık ilişkisi kurmuştur. *Muhabbet* türküsünün üçüncü dördlüğünde “yer ve gök” kavramıyla “yakın ve ırak” kavramları da tezatlık ilişkisi kurmuştur.

Boş durmak **günah**tır, çalışmak **sevap**
Çalış ne duruyon, sen de bir şey yap
Çoğalır yoldaşım, gör nice ahbap
Zengin isen ya bey derler, ya paşa
Fakara isen, ya Abdal derler, ya Cingan haşa

Muhabbettir **yerin göğün** direği
Aşk olmanın yanmaz yüreği
Muhabbettir **yakın** eden **ırak**
Hak muhabbettendir, muhabbet Hak’tan

1.3.2.3. Sözbilimsel Soru / İstifham

Sorulan şeye yanıt verme amacı gütmeyen soru ifadeleriyle anlamı güçlendirmek için yapılır. Deyişbilimde sözbilimsel soru, bir yanıt alma amacıyla değil de söylenenin doğruluğuna inandırma veya bir şeyin beğenilmeyişinin kesinliğini ifade için soru tümcesi kullanılmasıdır (Özünü, 2001: 260). *Dertli Yoldaş* türküsünün ilk dördlüğünde “Niye” soru sözcüğü ve “mI” soru edatıyla; *Yolcu* şiirinin nakarat kısımlarında “mI” soru edatıyla istifham sanatına başvurulmuştur:

Ey Garip gönüllüm, dertli yoldaşım

Niye belli değil, baharın, kışın
Var mıdır sormazlar, ekmeğin, aşın

Marak edip heç birini sordun **mu**
Bunlar neden nedenini sordun **mu**

1.3.2.4. Kişileştirme/Teşhis

İnsan dışındaki canlı veya cansız varlıkların insana ait özelliklerle nitelendirilmesidir. *Yolcu* türküsünde feryat etmek insana özgü bir özelliktir ve burada bülbüle aktarılmıştır.

Garip **bülbül** gibi feryat ederiz
Cehalet(cahiller) elinde küskün kederiz
Hep yolcuyuz böyle gelir gideriz

1.3.2.5. Telmih

Herkesçe bilinen geçmişteki bir olayı, efsaneyi, çağrıştırmayı, anımsatma sanatıdır. Ertaş, *Yolcu* türküsünde Gül ü Bülbül hikyesini hatırlatmak amacıyla telmih sanatına başvurmuştur.

Garip **bülbül** gibi feryat ederiz
Cehalet(cahiller) elinde küskün kederiz
Hep yolcuyuz böyle gelir gideriz

1.3.2.6. Mübalağa

Bir varlığı, olayı ya da düşünceyi olduğundan küçük daha büyük (ya da küçük) gösterme sanatıdır. Mübalağa, günlük yaşamda sıkça başvurulan bir anlatım yoludur. Ertaş da *Muhabbet* türküsünde muhabbetin değerini ve önemini anlatırken mübalağa sanatına başvurmuştur.

Muhabbettir yerin göğün direği
Aşk olmanın yanmaz yüreği
Muhabbettir yakın eden ırığı
Hak muhabbettendir, muhabbet Hak'tan

1.3.2.7. Akis

Cümle ya da dizedeki söz sırasının bir öncekinin tersi olarak düzenlenip tekrarlama sanatıdır. *Muhabbet* türküsünün nakarat kısımlarında “muhabbet ve Hak” sözcüklerini kullanarak akis sanatına başvurmuştur:

Gelin dostlar gelin muhabbet edek
Hak muhabbettendir muhabbet Hak'tan
Biz de bilenlerin yolundan gidek
Hak muhabbettendir, muhabbet Hak'tan

1.4. Sapma

Bir yazın türü olarak şiir dilini konuşma dilinden ayıran özellikler dizem, ölçü ve uyak gibi unsurlardır. Bu unsurlar yapı ve kurguda değişiklikler yaparak şiirin kendine has üslubunu oluşturmaktadır. Üslubun oluşmasındaki bu değişimler deyişbilimde sapma olarak nitelendirilmektedir. Sapmaların; sesbilimsel, sözcüksel, yazımsal, anlamsal, tarihsel dönem sapmalar gibi farklı çeşitleri bulunmaktadır (Özünü, 2001: 78-80). Ertaş'ın türkülerinde belirlediğimiz bazı sapma örnekleri şunlardır:

Sözcüksel Sapmalar

Sözcüklerde kök ve eklerin alışılmışın dışında birleşmesiyle ortaya çıkar. “Olağan dilbilgisi ve sözcük bilgisi dışındaki sözcüklerin şairler tarafından yeni biçimlerde yaratılması bu tür sapmalara örnektir.” (Özünlü, 2001: 146). Aksan'a göre bu kullanımla şair, dilde bulunmayan göstergelerden yararlanır (2005: 167).

Alışılmışın ve yerleşik kuralların dışında kullanılan yazım biçimleridir. Sesbilimsel sapmalar çoğunlukla ölçüye, uyağa uydurma endişesiyle şairlerin özellikle halk ve divan şairlerinin başvurduğu bir yöntemdir. Konuşma dilinde sıkça kullanılan ünlü yitimi, yazım kurallarında doğru olmayan sözcük yazımları, ek-sözcük uyumsuzluğu sesbilimsel sapmalara girmektedir (Özünlü, 2001: 78-80).

Ertaş, *Dertli Yoldaş* türküsünün beşinci dördlüğündeki “duruyon” sözcüğü konuşma dilinde “duruyorsun” şeklindedir. Ancak şair, ahengi sağlamak amacıyla sözcüğü sesbilimsel sapmaya uğratarak kullanmıştır:

Boş durmak günahtır, çalışmak sevap
Çalış ne **duruyon**, sen de bir şey yap

Dördüncü dördlükte “olduğun” sözcüğü “olduğunu” şeklinde yazılması gerekirken sesbilimsel sapmaya uğramış ve belirtme hal eki “T” ünlüsü düşmüştür.

O Hak’ı tanımaz, kul kandıranlar
İnsanlığın ne **olduğun** ne anlar

Çingene, Türkçe Sözlükte “Hindistan'dan çıktıkları söylenen, dünyanın çeşitli yerlerinde yaşayan bir topluluk.” (1998: 232) olarak tanımlanmıştır. Ertaş, yazım kurallarında doğru olmayan bir sapmaya uğratarak “Çingene” sözcüğünü “Cingan” olarak sapmaya uğratmıştır:

Fukara isen, ya Abdal derler, ya **Cingan** haşa

Yolcu türküsünün dördüncü dördlüğünde “hepsi” sözcüğü “hepisi” şeklinde kullanılmasından dolayı sözcük yapısı değiştirilmiş ve sapmaya uğramıştır:

İnsandan doğanlar insan olurlar
Hayvandan doğanlar hayvan olurlar
Hepisi de bu dünyaya gelirler

Sözdizimsel Sapmalar

Şiirin kendine özgü yapısı içinde olağan dışı bir dil kurgusu vardır. Bu dil kurgusunu sağlamanın en önemli adımlarından biri devrikleşme, eksiltme ve tamamlanmamış sözcüklerdir. Ertaş’ın *Dertli Yoldaş* ve *Muhabbet* türküsünde devrik cümle ile kurulan sapmaların bazıları şu şekildedir:

Zengin isen ya bey **derler**, ya paşa
Fukara isen, ya Abdal **derler**, ya Cingan haşa

Niye belli **değil**, baharın, kışın
Var mıdır sormazlar, ekmeğin, aşın
Muhabbettir yerin göğün direği
Aşk olmanın yanmaz yüreği
Muhabbettir yakın eden ırağı
Hak muhabbettendir, muhabbet Hak’tan

Lehçesel Sapmalar

Şairler şiire gerçekçi bir hava katmak istediklerinde olağan dil yerine lehçelerden ve ağızlardan yararlanabilirler. Ertaş, sadece çok iyi saz çalıp çok güzel türkü söyleyen bir sanatçı değil aynı zamanda hiç kimsenin bilmediği, duymadığı yeni türkülerin farklı bir üslup ve yorumla icra etmektedir. Yöresine ait ağız özelliklerini türkülerinde yansıtmaktadır. *Yolcu* türküsünde ana (anne), marak (merak), böyü, heç (hiç), gurt (kurt) bunlara örnek gösterilebilir.

Bir **anadan** dünyaya gelen yolcu
Görünce dünyaya gönül verdin mi
Kimi **böyü** kim böcek kimi **gurt**
Marak edip heç birini sordun mu
Bunlar neden nedenini sordun mu

Anlamsal Sapmalar

Anlamsal sapmalar, şiirdeki olağan dışılıkların söz sanatı şeklindeki özgün biçimleridir. Dizelerde alışılmamış sözdizimi varsa, alışılmamış sözcük seçimlerinden dolayı yapılan alışılmamış bağdaştırmalar bulunuyorsa ya da bu sayılan eğilimlerin her ikisi de birlikte kullanılıyorsa dizeler arasında sapma vardır (Özünlü 2001: 54-55). Ertaş’ın türkülerinde yer alan söz sanatlarına ait örnekleri anlam incelemeleri konusu içerisinde tespit etmiştik. Bu incelemeler aynı zamanda anlamsal sapmalar içerisinde de yer almaktadır.

SONUÇ

Neşet Ertaş, kökleri Orta Asya'ya dayanan abdallık geleneğinin son temsilcilerindendir. Babası merhum Muharrem Ertaş'tan usta-çırak ilişkisi içerisinde öğrendiği abdallık geleneğini ve müziğini içselleştirmiş ve eserlerine yansıtmıştır. Anadolu insanının duygu ve düşünce yapısını, toplumsal ilişkilerini, geleneklerini eserlerinde işlemiştir. Eserlerini sevgi, saygı, barış ve kardeşlik duygusuyla Hak yolunda engin gönülleri yeniden inşa etmeyi amacıyla dile getirmiştir.

Çalışmada *Dertli Yoldaş, Yolcu, Muhabbet ve İki Büyük Nimetim Var* adlı eserler çağdaş dilbilimin alt dallarından olan deyişbilimin unsurlarına göre incelenmiştir. Belli bir eğitimden geçmemesine rağmen Ertaş, babasından öğrendikleri ve yeteneği sayesinde yazmış olduğu bu türkülerde deyişbilimin unsurları olan yineleme, sapma, koşutluk ve önelemeye ait özellikleri yansıtmıştır. Kendine has üslubuyla türkülerinin yapısal şeklini sapmalar ve yinelemelerle sağlamış; vermek istediği mesajları ise koşutluk ve öneleme unsurlarıyla içten ve samimi bir duyguyla ifade etmiştir. Sözcükler arasındaki anlam ve yapı paralelliği şiirin etki gücü ile akılda kalıcılığını arttırmış, eserlerinin kolay hatırlanmasını sağlamıştır. Âşık, geleneksel Türk şiirindeki gibi alışılmış kalıplara dayanan bir uyak yapısı ve düzeniyle dize sonlarında yinelemeler ve koşutluk ilişkisine başvurmuştur. Özellikle türkülerin nakarat kısmında yapılan yinelemeler, vermek istediği mesajların anlaşılması açısından öne çıkmıştır. Anlam önelemelerinde stilistik bakımdan söz sanatlarına başvurmuş; türkülerinde istiare, tezat, istifham, tekrar, mübalağa, telmih, teşhis, akis gibi söz sanatlarından faydalanmıştır. Söyleyeceklerini yabancılaşmadan uzak, en sade biçimiyle herkesin anlayacağı açıklıkta saf ve temiz bir Türkçeyle ifade etmiştir.

Sonuç olarak Ertaş, usta-çırak ilişkisi içerisinde öğrenmiş olduğu âşıklık geleneğinin dil ve anlatım özellikleri eserlerine yansımıştır. Söz, ezgi ve manayı çağdaş dilbilimin alt dalı olan deyişbilimin kurallarını bilmeden ancak ona uygun bir şekilde yazmayı başarmış bir kişi olarak Anadolu'da abdallık kültürünün dilini, müziğini ve felsefesini yaşatmış ve geleceğe aktarmıştır. Bu çalışmada görüldüğü gibi eserlerinin deyişbilimin unsurlarına uygunluğu onu güzel türküler icra eden yetenekli bir köy sanatkârı gibi algılanmasının dışına çıkarak Anadolu insanının öz dilini, müziğini ve felsefesini ortaya koyan ve gelecek kuşaklara aktaran büyük bir sanatkâr olarak anılmasını sağlamıştır.

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A Critical Analysis of the Relationship Between Language-Meaning and Logic in Ludwig Wittgenstein's *Tractatus Logico-Philosophicus*

AYŞE ACARER*¹

Abstract: Ludwig Wittgenstein examines the relationship between language, meaning and logic in his work *Tractatus Logico-Philosophicus*. In this study, the connection between language and logic and the way language represents the world are investigated. In the *Tractatus*, Wittgenstein argues that language's relationship with reality depicts the world and mentions that this should be put forward in a logical form. Because language points to reality, and logic points to the basic structure of language. Thus, according to Wittgenstein, language reflects reality only with sentences that conform to logical form. In this respect, sentences that carry metaphysical and ethical meanings exceed the limits of language and cannot be described as true or false. Because they have no equivalent in the phenomena in the world. Therefore, discourses that remain outside the limits of reality and language are logically meaningless. Wittgenstein's views, which he defended in his *Tractatus*, can be criticized in various contexts. These criticisms usually arise on the grounds that he ignores the more complex and multidimensional structure of language and meaning. In addition, it can be argued that the strict boundaries set by Wittgenstein are insufficient to reflect the actual use of human language. Because, contrary to Wittgenstein, it can be argued that language does not consist solely of meaningful, logical and directly connected sentences with the real world, and that it cannot be spoken of only truth-based or factual forms of expression. For example, emotional, ethical or aesthetic expressions do not have any logical meaning according to Wittgenstein's way of thinking. However, everyday language contains elements such as metaphors, ambiguities and ambiguities. In addition, Wittgenstein rejects the role of logic in morality and metaphysics in the *Tractatus*. Because, according to Wittgenstein, morality and metaphysics have no counterparts in the external world. However, the meaning of an ethical principle or a metaphysical problem can often be understood through the forms of expression in language and social contexts, regardless of its truth. In his early period, including his work *Tractatus*, Wittgenstein argued that the meaning of language is determined by logic and truth, and did not concern himself with the issue of how language functions in social contexts and in the daily experiences of users. However, this view ignores meaningful human experiences outside of language, such as thoughts, emotions, and abstract concepts. In addition to this, the boundaries of language are shaped not only by logic, but also by human perception and experience. Thus, the functionality of language can extend to a wider dimension, structurally and intellectually, compelling people to produce expression and meaning. The meaning of language cannot be determined solely by the issue of being right or wrong. It also depends on its purpose of use, the context in which it occurs, and the ways in which people interact with the world through language. Therefore, language also carries meaning with how it functions in practice, society and interaction. The aim of this study is to develop criticisms of the arguments put forward while Wittgenstein presents the language-meaning and logical relationship in his work *Tractatus*. In addition, it is aimed to determine the functionality by analyzing the existing criticisms in the context of language-meaning and logical assumptions and to provide possible solutions.

Keywords: Logic, Language, Meaning, Wittgenstein, Tractatus

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1. INTRODUCTION

Wittgenstein's *Tractatus Logico-Philosophicus* is a paradigmatic text that defines the boundaries of philosophy of language and logic in twentieth-century analytic philosophy. The basic thesis of the text is that the world is a set of facts; these facts are represented isomorphically with the logical structure of the propositions that constitute language. Thus, reality can be depicted through language, but it gains meaning only through logical form (Wittgenstein, 2023). The syllabic system developed by Aristotle in the fourth century BC secures the validity of reasoning through three-term syllogisms (Aristotle, 1995). Although both thinkers see logic as a necessary tool, they differ in terms of the way they position ethics and metaphysics. Wittgenstein declares ethical and metaphysical propositions "unsayable" by depriving them of their truth value. Aristotle, on the other hand, argues that ethical truths contain a purpose (telos), and in *Nicomachean Ethics* he deals with the logical analysis of these purposes (Acarer, 2024).

Aristotle, on the other hand, defends the power of ethical truths as an end (telos) and deals with the analysis of the motion of these ends in *Nicomachean Ethics*. Wittgenstein's logical atomism is inspired by the formal languages of Frege and Russell (Frege, 1892; Russell, 1905). The Aristotelian tradition, on the other hand, was developed by Averroes, Thomas Aquinas and many other thinkers throughout the Middle Ages, preparing the transition to modern logical theories. In the middle of the twentieth century, Quine built a theoretical bridge by carrying Aristotle's term logic to modern predicate logic (Quine, 1960).

This historical vein forms the basis of the comparison to be presented in the research. In the analytical tradition after the *Tractatus*, language is considered a symbolic system that carries meaning. Chomsky (2014) emphasized innate rules by associating language ability with cognitive capacity. In contrast, Wittgenstein seeks the meaning of language in logical form and reduces semantics to truth conditions. Concepts such as synonymy, reference, and language games gain importance in Wittgenstein's late writings. The Aristotelian tradition establishes a direct link between verbal imputation and the hierarchy of being by equating linguistic categories with ontological categories.

Frege's distinction between material (*Sinn*) and reference (*Bedeutung*) in his theory of meaning is a precursor to the picture theory of the *Tractatus*. Wittgenstein relates this distinction to intra-worldly phenomena in a more radical way (Wittgenstein, 2023). The theory of reference was updated by Kripke (1980) through natural kind names; Kripke associated the necessity in identity propositions with the *a priori-a posteriori* distinction. In this context, the strict isomorphism thesis of the *Tractatus* can be questioned within the framework of Kripke's modal logic.

Modal logic expresses the modalities of possibility, necessity, and possibility with logical operators. Kripke semantics extended the truth-functional framework by modeling the relation between possible worlds with access functions. Wittgenstein's thesis of isomorphism between worlds, although not directly applicable to modal extension, inspires the idea of multiplying the basic picture-reality correspondence between possible worlds. Aristotle's distinction between potential and actual also provides an early philosophical basis for modal discussions.

In Aristotle, logic is the common organon of the sciences. Universal syllogisms define the necessary aspect of knowledge. Wittgenstein, on the other hand, makes logic the gatekeeper of language; the distinction between the meaningless and the meaningful is determined through logical form. This functional difference directly affects the epistemic status of metaphysics. In Wittgenstein, metaphysical propositions require silence, while in Aristotle, metaphysics investigates the first principles of existence.

2. Language, Meaning and Logic in the *Tractatus*

The *Tractatus* defines propositions as truth-functional structures; the basic operators are the conjunctions "and", "or", "not", and "if". These operators parallel the symbols used by Russell in *Principia Mathematica*. Wittgenstein argues that all logical statements can be constructed with these operators and atomic propositions. Thus, the universality of logic is secured by symbolic minimalism.

After its publication, the *Tractatus* was enthusiastically received by logical positivists such as Moritz Schlick and Rudolf Carnap. In his *Logical Syntax of Language*, Carnap constructs the syntax of scientific language, inspired by Wittgenstein's truth-functional logic (Carnap, 2014). However, when Gödel's incompleteness theorems showed that logical systems were not complete, the *Tractatus*'s ideal of a closed system came under criticism. In the *Philosophical Investigations*, the late Wittgenstein acknowledges the limitations of picture theory and turns to the concept of language games, thus offering a dialectical corrective to the early period (Wittgenstein, 2023).

Picture theory suggests that language elements correspond one-to-one to objects in the world. The principle of isomorphism claims that logical form corresponds to the structure of reality. This idea has established an interdisciplinary link with model theory; the Löwenheim-Skolem theorems have shown the limits of correlation between formal systems and models. Thus the picture theory of the *Tractatus* was a precursor to model-theory analyses in mathematical logic.

Wittgenstein's 7th sentence, "What cannot be said must be kept silent about.", includes the limitation of philosophy with a negative definition. This approach leads to the exclusion of metaphysics from the field of "meaningful" inquiry. However, Austin's speech acts expand Wittgenstein's limit by shifting the function of speech from declarative to performative. Thus, language is positioned not only as a descriptive but also as an active tool.

The concept of language games emphasizes the rule-based structure of social activities. Speech act theory analyzes how these activities are reinforced by the speaker's intention. Both approaches place meaning in the context of the activity, thus indicating, functionality beyond truth value. This perspective parallels Aristotle's dialectical method, in that dialogue contributes to the formation of knowledge by synthesizing opposing views.

The *Tractatus*, although limited in its linguistic description of mental states, sees thought as a logical function of language. The proposition that "thought is the meaning of the proposition" reduces mental description to logical picture. In contrast, contemporary philosophy of mind criticizes Wittgenstein's early identification of language with thought, and resorts to neural correlates, phenomenal properties, and computational models to explain conscious experience (Wittgenstein, 2023). Aristotle's concept of 'nous' (entelechy) describes the active reasoning faculty of the mind, and emphasizes the independence of the thought form from matter. These two approaches offer different metaphysical commitments to the mind-language relationship.

Popper's falsifiability principle requires that scientific theories be testable. Wittgenstein's definition of the meaning condition in terms of logical form instead of verifiability presents a methodological opposition to Popper's approach. Aristotle's definition of scientific knowledge, on the other hand, is partially compatible with Popper's hypothetico-deductive model because it is based on the cause-effect relationship. This discussion reassesses the role of logical criteria in scientific rationalism (Popper, 2005).

Wittgenstein attributes many problems of metaphysics to linguistic fallacies; the phrase 'falling under the spell of language' indicates that categorical confusions lead philosophers into error (Wittgenstein, 2023). Aristotle also systematically classified logical fallacies by analyzing in detail the fallacious arguments of the sophists. The current literature on cognitive fallacies follows the path opened by these two traditions; it examines both the linguistic and cognitive roots of false inferences.

3. Categorical Structures and Language in Aristotelian Logic

Aristotle defines 19 different forms of syllogism in *Analytics*. All of these forms are derived from four possible propositions: A (universal positive), E (universal negative), I (particular positive), O (particular negative). Syllogisms are divided into first, second and third figures according to the position of the middle term. In late antiquity, Theophrastus and Boethius expanded this system; thus the subject was interpreted in the tradition of medieval Islamic logic.

The ten categories in *Categories* determine the quality of being through logical attribution. Substance is the condition of being of other categories. Categories such as quality and quantity become predicates in substance and form propositions. This structure re-emerges in modern ontology languages as a class-property relationship. Current logic studies reinterpret Aristotle's categories as the basis of algebraic structures. For example, in categorical logic theory, the concepts of 'object' and 'morphism' show a formal parallelism with Aristotle's categories of substance and relation. Lawvere's categorical semantics approach defines the harmony between language and meaning through functional morphisms. Thus, Aristotle's distinction between quantity and quality has transformed into the distinction between type and value in contemporary type theories. This evolution provides new conceptual tools while demonstrating the historical continuity of logic.

Similarly, Aristotle identifies the principle of non-contradiction as the most solid principle of philosophy. This principle is in principle compatible with the truth-functional logic of the *Tractatus*. However, Aristotle's insistence on the impossibility of the third option (*tertium non datur*) provides critical ground for multivalent approaches to logic. Priest (2017) challenges Aristotelian dogma by showing that this principle can be relaxed with paraconsistent systems.

Wittgenstein's atomic propositions bear a superficial resemblance to Aristotle's particular propositions (Wittgenstein, 2023). But in Wittgenstein, structure is constrained by symbolic logic, whereas in Aristotle, meaning is enriched by the concepts contained in the terms (Wittgenstein, 2023). This differentiates the role of logic in determining meaning.

Aristotelian logic is strong in its ontological commitment; it is based on the idea of substance, change, and purpose. Wittgenstein, on the other hand, prefers ontological silence; his description of the world accepts the mere existence of objects but does not clarify the issues of essence, purpose, and value. This difference radically affects the position of metaphysics within logic.

Thus, Wittgenstein's logical inferences are represented by truth tables and are computationally amenable. Aristotle's inferences, on the other hand, work with terminological transformations and are semantically richer but formally more limited. Today, artificial intelligence systems take advantage of both approaches in their automatic reasoning engines. For example, Description Logic-based ontologies are nourished by the Aristotelian conceptual heritage, while Boolean logic operators are nourished by Wittgensteinian symbolism.

4. Discussions on Wittgenstein's Views on Language, Meaning and Logic

Anscombe (1959) interprets the term 'meaningless' in the *Tractatus* conceptually: According to her, Wittgenstein's aim is not to validate metaphysical discourse but to expose its linguistic basis. Diamond (2002) argues that the *Tractatus* is a therapeutic text that forces its reader to question their own linguistic habits within the framework of 'resolute reading'. Hintikka (2013) argues that Wittgenstein's logic-language isomorphism can be extended to the framework of possible worlds through modal logic.

Austin (2025) and Searle (1969) overcome Wittgenstein's thesis of silence by analyzing the logical status of speech acts. According to them, speech acts are not descriptive but performative. Therefore, ethical and metaphysical forms of expression are also functional in the social context. Bourdieu (2020) associates linguistic habits with the concept of *habitus*. Thus, language is positioned as an inherent element of social practices.

The fields of symbolic logic, natural language processing, and artificial intelligence have adapted the legacy of Wittgenstein and Aristotle to technological projects. For example, inductive queries in knowledge base systems are

derived from Aristotelian term logic, and rule-based inferences are derived from Wittgenstein's truth-functional logic. This hybrid approach is critical for ensuring semantic consistency in the age of big data.

In addition, Wittgenstein's placement of ethical statements in the status of the 'unsayable' moves normative philosophy outside the design of language. This silence, on the one hand, offers an ideal of linguistic purity; on the other hand, it inhibits the requirements of practical reason. Aristotle's systematic presentation of virtue ethics in the *Nicomachean Ethics* is an example of the integration of logic and ethics.

Metaphysics, in Aristotle, deals with the first principles of being; 'being as being' is examined. Wittgenstein's perspective, on the other hand, pushes metaphysics into structural silence. Metaphysics remains demonstrable, unsayable. This opposing attitude determines the vision of the philosophical method.

Contemporary value theorists transcend Wittgenstein's principle of silence with critical pragmatism. Linguistic acts create values and codify social norms. This view allows for the development of value-laden logical systems by incorporating Aristotle's concept of virtue into Wittgenstein's logical form.

Wittgenstein and Aristotle are two powerful thinkers who determined the role of logic in language and reality. Wittgenstein positioned the logical form as the limit of language; he left ethics, metaphysics and aesthetics outside this limit. Aristotle integrated logic with the ontological category system; thus, he placed all areas of philosophy in the science of logic. The formal precision of logic and ontological richness together open new horizons of research in both philosophical and practical contexts.

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EU Accession and Sustainable Tourism: How Albania's EU Integration Process Influences Green Tourism Policies

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Abstract: Albania's journey, in its European Union integration, has helped shape its policies and practices in area such as tourism. Albania, as it crawls towards EU membership statehood, is adjusting its tourism industry to align with EU standards of sustainability and environmental preservation. This paper explores the impact of Albania's EU integration on its ecotourism policy. Assesses the degree to which the country is incorporating EU guidelines, for sustainable practices in its national tourism policy. The research uses a range of methods, through the use of policy analysis and case studies in Albania. The research initially discusses the eco-tourism developments, in Albania by way of an overview of recent policies such as the National Sustainable Tourism Strategy 2023-2030 and an analysis of their alignment with European Union policies such as the European Green Deal and EU Biodiversity Strategy frameworks. Inconsistencies, in enforcing rules and regulations are experienced together with infrastructural shortcomings in sectors like waste management and environmentally friendly transport systems; further compounded by collaboration between the government officials and stakeholders in tourism as well, as local communities. The paper suggests solutions to these issues by making recommendations on actions and investing in infrastructural development and promoting partnerships, both among the public and private sectors and exploiting funding opportunities, from the EU. By prioritizing these, Albania can reinforce tourism plans and develop a more sustainable tourism industry that is friendly to nature and also the residents.

Keywords: EU Integration, Sustainable Tourism, Ecotourism Policy, European Green Deal, Environmental Governance

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1. INTRODUCTION

In nations, around the world today including Albania tourism plays a role in boosting economic development and this holds true for Albania as well. In years Albania's tourism industry has undergone changes and improvements. With its background untouched natural scenery and extensive coastline, the country has drawn a rising influx of foreign tourists. This surge in visitors has not boosted only the country's GDP significantly, but it has also created numerous job opportunities, for its residents. Recent data indicates that tourism plays a role in contributing to Albania's economy and is seen as an element, in driving the nation's financial growth forward. Nevertheless, despite its significance the surge in tourism within Albania has presented obstacles especially regarding the sustainability of the environment. The mesmerizing charm of Albania's landscapes and historical landmarks has spurred an uptick in infrastructure projects a rise in tourist arrivals and an escalating need, for services. These advancements have supported the growth of the tourism sector. Have also sparked worries, about the lasting effects on the environment such as damage, to habitats and overuse of resources leading to pollution concerns. The significant growth, in the tourism industry has highlighted the importance for Albania to establish tourism strategies that harmonize progress with environmental conservation efforts. Sustainable tourism is crucial in mitigating the effects on the environment and society while maximizing outcomes. An essential element in worldwide tourism progression. Albania's varied landscapes and ecosystems from the Riviera to its mountainous terrains render the nation vulnerable, to harmful impacts caused by unsustainable tourism methods. Henceforth, in Albania's context it is crucial to formulate and execute strategies that endorse eco-tourism initiatives. Tourism that gives precedence to sustainability and safeguards natural assets, for upcoming generations.

As Albania progresses towards joining the European Union (EU) the process of EU integration poses a challenge and opportunity for the country to harmonize its tourism policies, with sustainability norms. The EU has consistently advocated for growth. Its regulations have influenced how member nations address environmental conservation efforts as well, as social and economic sustainability measures. The European Union's dedication, to the Green Deal initiative to achieve climate neutrality by 2050 sets a foundation for its sustainability goals. The integration of Albania into the EU offers an opportunity for the country to revamp its tourism industry by embracing eco practices aligned with standards, for environmental conservation and sustainability. Albania's journey, towards joining the European Union is an diverse process that involves implementing a range of changes in areas like governance and economic growth to meet the EUs criteria for member countries to harmonize their domestic laws with EU rules and norms. In the tourism industry context of Albania's integration efforts with the EU entails following guidelines such as the Habitats Directive and Birds Directive along, with broader sustainable development strategies outlined by the EU framework. As Albania moves, towards EU accession requirements there is an anticipation for the country to incorporate concerns into its policies which will have a noteworthy impact on its tourism sector. Specifically, Albania is projected to formulate eco-tourism strategies that tackle subjects, like waste disposal, energy conservation, preservation of wildlife diversity and sustainable transportation.

This paper sees how Albania's journey, towards EU integration has impacted its ecotourism initiatives by studying the alterations in the country's tourism approaches stemming from EU mandates. As Albania progresses towards fulfilling the EU accession prerequisites the tourism industry has emerged as an area for policy enhancement with a focus, on harmonizing protocols with EU norms. Albania has the responsibility to incorporate EU policies into its tourism practices effectively while maintaining a balance, between development and sustainability, within the country's framework.

The impact of EU integration, on Albania's eco-tourism strategies is complex and varied. In the beginning the European Union has been instrumental in promoting an eco-approach to tourism by offering financial aid and guidance on policies. EU grants, such as those, from the European Neighborhood Instrument (ENI), have been utilized to fund initiatives that support tourism in Albania. These initiatives have played a role, in increasing understanding of the significance of safeguarding the environment. Have offered useful strategies and materials for launching ecofriendly tourism projects. Moreover, the European Union has promoted collaborations between Albania and fellow EU nations enabling the sharing of expertise and successful approaches, for fostering tourism growth. Nevertheless, the process of European Union (EU) integration has definitely impacted the tourism policies of Albania; however, the nation encounters hurdle in adopting EU sustainability norms, in the industry. A major challenge lies in the capability and technical knowledge required to uphold and oversee environmental rules. Although there has been headway in synchronization with EU regulations Albania's tourism field is still undergoing modernization calling for investments, in infrastructure development workforce training and enhancing capacity. Furthermore, the tourism industry, in Albania needs to undergo a change as some operators may not fully understand the lasting advantages of tourism practices or might be reluctant to embrace them due, to immediate cost concerns.

One of the issues is the spread of tourism growth, throughout the nation. Though coastal regions and big cities have seen a surge in tourist numbers, rural areas and explored locales are frequently neglected. This disparity presents obstacles for promoting tourism since it may result in a concentration of tourists, in specific areas straining local resources and ecosystems unnecessarily. In order to tackle these concerns, about tourism in Albania effectively the country must create strategies that support environmentally friendly tourism, throughout all regions. This approach aims to ensure that both known and undiscovered areas reap the rewards of tourism growth. Moreover, Albania's tourism industry is currently undergoing a revival following the challenges brought about by the COVID 19 pandemic that affected travel and tourism, on a scale in ways never seen before. As the industry works towards recovery there exists a chance to reassess strategies for tourism development by emphasizing the concept of rebuilding stronger and integrating sustainability as an aspect of the recovery process. This shift would be in line with movements promoting responsible tourism and could establish Albania as a frontrunner in ecofriendly tourism, within the region.

This paper is organized based on three research quotations; (1.) In what ways has the EU integration impacted the development of tourism policies, in Albania? (2.) What are the primary policy adjustments that have been made in Albania's tourism industry as a result of EU accession prerequisites? (3.) What obstacles does Albania encounter in embracing EU sustainability criteria in tourism?

2. LITERATURE REVIEW

2.1. EU Policies on Sustainable Tourism

The European Union has acknowledged the value of tourism, within its environmental and economic objectives for quite some time now. In the EUs perspective sustainable tourism is mainly guided by policies that prioritize protecting the environment and promoting opportunities and social welfare. Key policies like the European Green Deal, the EU Biodiversity Strategy and the Sustainable Tourism Agenda are instrumental, in influencing how tourism is planned and operated in member states.

The European Green Deal was launched in 2019 as an initiative, by the EU to lead Europe towards becoming the climate neutral continent by 2050. Its goal is to reshape the EUs economy through lowering carbon emissions promoting renewable energy sources and enhancing sustainability across various sectors like tourism. Tourism bearing the brunt of climate change and environmental harm is an area of emphasis, within the Green Deal initiative. The agreement promotes the advancement of infrastructure and energy efficient construction projects, for tourism purposes while supporting the industry's expansion (European Commission 2019). Essentially it involves advocating for methods that lower the impact of tourism activities improve the use of resources and safeguard natural resources. The EU Biodiversity Strategy, for 2030 plays a role within the European Green Deal and its impact extends to the tourism sector as well. Emphasizing the importance of halting biodiversity decline in its tracks the strategy points out the necessity of land management. Safeguarding key ecosystems that often face risks due, to tourism related activities. For instance, it stresses the significance of preserving the sanctity of protected areas and ensuring that tourism practices do not disrupt habitats or jeopardize species survival (European Commission, 2020). In efforts to safeguard biodiversity and boost economies community based tourism and ecotourism stand out as promising approaches. The Sustainable Tourism Agenda, in the

EU goes a step further in promoting tourism by providing a plan for tourism growth within the EU region. It encourages policies that back tourism facilities and responsible tourism behaviors while also focusing on generating employment opportunities, in green industries (European Commission 2018). This involves upgrading waste disposal methods and enhancing public transportation systems alongside supporting projects that conserve the natural heritage. The agenda also highlights the importance of digitalization, in improving the sustainability of tourism by creating platforms that support eco travel choices and encourage responsible tourist conduct. In short the European Union's approach, to tourism focuses on balancing advancement and environmental conservation objectives. Through offering standards and financial support, for tourism initiatives the EU aims to develop a tourism industry that's robust, inclusive and ecofriendly ensuring that the environmental impact of tourism is minimized while its beneficial socio economic aspects are maximized (European Commission, 2020).

2.2. Albania faces challenges, in its tourism industry regarding sustainability.

In the years there has been a noticeable increase, in tourism in Albania due to its diverse cultural history and beautiful natural scenery along with its pleasant Mediterranean weather making it a sought after spot for tourists from around the world as noted by the World Travel and Tourism Council (WTTC). In 2019 tourism contributed to 20% of Albania's output and continues to play a crucial role, in generating jobs especially in rural regions. The nations tourism spots vary from its beaches, along the Albanian Riviera to the UNESCO designated sites in Butrint and Gjirokastër. This expansion has been driven partly by Albania's push to position itself as a rising tourist hotspot, aided by enhancements, in infrastructure better transportation links and marketing campaigns. While tourism brings benefits to Albania's economy and communities in the term; however, it also poses sustainability challenges that could jeopardize the sectors future prospects in the long run. The issue of overdevelopment is particularly prevalent, along the coastlines where rapid growth and construction activities have resulted in degradation including habitat destruction and pollution. A significant concern is the establishment of large scale resorts along the Albanian Riviera which may drive tourism but also pose a threat, to the regions ecosystems and local populations (Nugent 2021). Moreover, in regions there is a tendency for infrastructure projects to overlook the importance of sustainability which can lead to issues, like water shortages soil degradation and loss of forests. Proper waste management poses a challenge, for the tourism industry in Albania as efficient waste collection and disposal systems are lacking in popular tourist destinations leading to litter problems and environmental pollution. Especially in rural and coastal regions where the issue is most pronounced during peak tourist periods due to seasonal fluctuations, in waste production exacerbated by inadequate recycling facilities and waste treatment infrastructure (Shukri et al., 2020). The lack of defined and efficient rules, in the tourism industry is also hindering Albania's progress in encouraging sustainable practices within the sector. Although the nation has taken steps forward in times to bring its tourism policies in line with sustainability norms, the execution and monitoring of these guidelines are still lacking. Challenges such as corruption, limited technical knowhow and insufficient institutional capability add to the complexities of enhancing sustainability, in the tourism sector (Bajraktari & Zeneli 2020). Albania's tourism industry is still grappling with the struggle to harmonize development and environmental conservation efforts.

2.3. EU Membership and Policy Coordination

Albania's journey, towards joining the EU includes a series of discussions and changes focused on harmonizing the nations framework and economic systems with EU norms. The aspiring countries must implement a variety of measures across areas such as tourism alignment with EU requirements is crucial, for Albania. This entails integrating assessments into policies upgrading waste management practices and supporting tourism endeavors.

In the process of joining the EU union lies an aspect where national policies are brought in line, with EU laws known as the "acquis communautaire." This set of regulations encompasses the laws that aspiring member nations need to adhere to within their frameworks for alignment purposes, with the EU standards and practices. The tourism industry falls under this overarching arrangement well; aspiring member nations are required to enforce rules that support sustainability and ethical tourism practices. In Albania's instance this coordination has resulted in the creation of strategies geared towards enhancing waste disposal methods cutting down on carbon emissions and safeguard biodiversity in tourist destinations (Müller, 2019). Numerous research works have explored how the integration of the EU has brought about changes, in fields such as tourism. The studies indicate that becoming a part of the EU can greatly influence the formulation of policies in nations, like Albania that are currently working towards updating their institutional structures. In the case of the EUs focus, on safeguarding the environmental aspects has brought about rules being implemented and the creation of designated conservation sites and ecofriendly tourism projects in nations, like Croatia and Montenegro (Rupa et al., 2021). These changes have played a role in encouraging environmentally conscious tourism behaviors while enhancing environmental management and bolstering the resilience of the tourism industry. While there are challenges, in harmonizing Albania's tourism policies with EU sustainability norms; the lack of capacity hinders effective enforcement of regulations by various government agencies overseeing tourism and environmental conservation efforts in the country. The limited public awareness about sustainable tourism practices in Albania poses a hurdle in garnering widespread backing, for policy changes as highlighted by Bajraktari & Zeneli (2020). EU integration offers Albania an opportunity to upgrade its tourism industry framework and effectively implementing these strategies could boost the country's standing as a player, in tourism, within the region.

3. METHODOLOGY

This research adopts a method to analyze the implications of Albania's accession into the EU, on its ecotourism policies with a focus on evaluating how EU membership has influenced the country's tourism industry and achievement of sustainable tourism principles. This is the optimum method for investigating the contents of policy documents and attempting to gain information, from the people involved in developing and implementing tourism policies. Content analysis will likewise be used in examining the policy documents and the secondary sources in order for the researcher to systematically track trends, change, and harmonization with EU sustainability norms. The method will underscore significant policy shifts over time, most particularly those which relate to environmental sustainability in the tourism sector. Through an in-depth analysis of Albanian and EU policy documents, the research will uncover where Albanian policies are in alignment with EU recommendations, areas of divergence, and how these reforms may have influenced green tourism strategy development in Albania. The research will also analyze the influence of EU support, including financial and technical assistance, on these policies. Policy documents such as the National Tourism Strategy, EU directives, and green tourism policies will be analyzed for sustainable development themes, environmental sustainability, and EU policy influence. Finally, the research approach in this study is a combination of qualitative research methods—policy analysis, case studies, to explore the influence of EU integration on green tourism policies in Albania. This approach enables there to be a detailed examination of policy documents, case studies of sustainable tourism projects in action, and contributions from major stakeholders in the process. By content and thematic analysis of the evidence collected, this study aims to present a comprehensive and balanced picture of how the tourism sector in Albania is responding to EU sustainability requirements, the challenges it faces, and the potential for future development of green tourism.

Descriptive Analysis of Albania's Tourism and EU Integration

Albania's tourism industry has expanded fantastically, offering 26% of GDP by 2024. Albania's 2023-2030 National Sustainable Tourism Strategy harmonizes with the sustainability policies of the EU and supports the promotion of eco-tourism through locations such as Theth and Gjirokastrë with emphasis on community-based tourism. However, implementation problems manifest themselves as low rates of observance of Environmental Impact Assessments (EIAs), infrastructures of bad quality for sustainable transport and waste management, as well as limited stakeholder involvement, especially rural stakeholders. Further, wasteful consumption of resources causes unbalanced regional economic benefits. It is imperative to address such issues in order to maximize the contribution of tourism towards Albania's EU integration as well as sustainable development of the sector in the long run. In table 1 we compared Albania with Montenegro and North Macedonia on some key insight like EU Accession Status, Tourism GDP contribution, Policy Framework, Eco-certification Adaption etc. We compared Albania with Montenegro and North Macedonia because three nations have similar geographical, economic, and political backgrounds:

Table 1

Indicator	Albania	Montenegro	North Macedonia
EU Accession Status	Candidate country, ongoing negotiations	Joined EU accession process in 2010, advanced integration	Candidate country, EU accession negotiations in early stages
Tourism GDP Contribution (2024)	24%	25%	1.8%
Policy Framework	National Sustainable Tourism Strategy 2023-2030	National Strategy for Sustainable Tourism 2021-2030	National Tourism Strategy 2020-2025
Eco-certification Adoption	Limited, in pilot phase (Green Key certification)	More developed eco-labeling system	Limited, in pilot phase (Green Key certification)
Green Infrastructure	Insufficient, particularly in rural areas	Significant investment in eco-friendly resorts and transport	Limited investment, especially in rural areas
Waste Management Efficiency	Low, especially in coastal and rural areas	Moderate, EU funding has improved infrastructure	Low, but improving with EU support
Public-Private Partnerships	Emerging but not widespread	Stronger collaboration, eco-tourism investments	Developing, with some emerging eco-tourism projects
EU Funding Utilization	Underutilized, slow absorption	More effective use of EU environmental funds	Moderate utilization, with room for improvement

Montenegro leads the green tourism owing to enhanced EU funding absorption and policy application. The most pressing challenge in Albania is infrastructure and eco-certifications, and additional investment in sustainable transport and waste management. Public-private partnerships are more developed in Montenegro and they enhance the development of the eco-tourism within the national parks and along the coastline.

4. FINDINGS AND DISCUSSION

4.1. Policy Reforms in Tourism in Albania

Recent developments in Albania with respect to its EU accession process have given rise to some key policy reforms aimed at bringing Albania's tourism sector in line with sustainability standards common to most of Europe. The reforms in general are designed to improve environment governance and increase sustainability within the tourism sector.

Arguably the most important reform has been the passing of Environmental Impact Assessment (EIA) regulations for tourism developments. The EIA procedure essentially made the developers take into consideration the environmental impacts of their tourism development before it could get off the ground. This sort of legislation goes toward counteracting the negative environmental effects that construction of new tourism infrastructure may have, be it hotels, resorts or tourist attractions. EIA regulations are based on EU directives, designed to ensure that tourism development is sustainable, environmentally sound, and respects local ecological systems and populations. But the policy recognition of this regulation lies mainly in implementation and enforcement- and there the law presently fails due to poor enforcement. Besides the EIAs, a few waste management regulations have been recently introduced by Albania in areas of major tourist interest. There has also been a move in Albania to propagate eco-labeling and certification programs for tourism operators. They try to persuade hotels, restaurants, and tour operators toward the sustainable path by certifying businesses that fulfill set environmental criteria such as energy efficiency, water conservation, and waste reduction. The "Green Key" certification, in fact, has been quite popular among the EU, and it is in its pilot phase in Albania to reward tourism businesses for undertaking sustainable practices on the one hand and enabling them to stand out competitively in the international arena on the other. However, while bringing hope for these initiatives, the level of success is still being questioned due to very low awareness among small and medium tourism operators about certification benefits and the lack of a widespread capacity to implement the required standards.

4.2. Successful Green Tourism Cases

Notwithstanding all its challenges, few instances of green tourism in Albania do provide lessons and the potential of developing sustainable tourism on a larger scale in this country. Two places stand as shining examples of successful green tourism initiatives: Theth and Gjirokastrë. Hidden away in the Albanian Alps sits Theth, a small village where tourism green hotels and community-based tourism have been implemented. The community of Theth supports sustainable tourism by building eco-lodges that utilize renewable energy, mostly solar, and marketing local products and services to tourists. Plus, Theth has grown into a hiking and nature tourism hotspot to guarantee that tourist activities do not harm the pristine natural environment. With local communities participating in tourism planning and management, the benefits of tourism are shared more or less fairly, and they also ensure minimum environmental interference. This system has helped increase local incomes while gradually preserving the natural and cultural heritage of the area; this has revealed that the ecotourism route can prosper in Albania.

Likewise, Gjirokastrë, a UNESCO World Heritage Site, has embedded sustainable tourism in its development priorities. Simply put, the city itself, with its historical buildings, is conserved, while eco-tourism activities, which provide for cultural heritage and sustainable ways of travel, are encouraged.

The city of Gjirokastrë demonstrates to other municipalities how to maintain UNESCO status by supporting responsible tourism through combined efforts from local officials and NGOs. Gjirokastrë businesses have implemented sustainable practices to minimize waste production and reduce energy consumption because of rising customer interest in eco-friendly tourism. The combination of cultural heritage preservation with eco-friendly tourism practices presents a viable path to achieving sustainable tourism models that generate profit.

4.3. Challenges in Policy Implementation

The Albanian tourism sector has made advancements toward EU sustainability standards yet multiple key obstacles persist in implementing these policies effectively. A fundamental barrier exists because of incomplete regulations and the insufficient enforcement of environmental laws. Multiple sustainability improvement policies exist in the country but their implementation varies from one case to another. The existing regulations for tourism projects to undergo environmental impact assessments get ignored or improperly implemented in fast-growing rural and coastal tourist areas. The waste management legal system and eco-certification processes are still evolving while the country lacks adequate control mechanisms for monitoring and punishing violations.

The lack of proper infrastructure represents a critical obstacle for the tourism industry. Rural and remote Albanian destinations suffer from insufficient infrastructure which prevents the development of sustainable tourism. Environmental sustainability for large-scale operations becomes challenging because of the underdeveloped waste management systems and restricted eco-friendly transportation and renewable energy facilities. Coastal holiday locations including Dhermi and Jale Beach experience severe problems with waste control and water contamination throughout their busiest tourism season.

4.4. Comparative Analysis with Other EU Candidate Countries

Albania demonstrates varying success in its implementation of EU sustainability standards when compared to Montenegro and North Macedonia which are also EU candidate countries.

The coastal destination of Montenegro demonstrates remarkable success in building sustainable tourism facilities across its territories. Through various eco-certification programs the country develops tourism operators who maintain green infrastructure while creating eco-friendly accommodations and waste treatment systems. Montenegro stands as the regional leader in environmental conservation by simultaneously developing tourism and preserving its natural assets to establish its position in Balkan green tourism. Albania faces several deficiencies in both eco-certification programs and the establishment of green infrastructure projects thus falling behind its regional neighbors. While Albania has initiated some eco-labeling programs and undertaken efforts to improve waste management in tourist destinations, the overall level of investment in green infrastructure and services remains lower than that of Montenegro. Moreover, Albania's regulatory framework for tourism sustainability is still in its infancy, and the country's tourism sector faces more significant challenges in enforcement and compliance with environmental laws compared to its EU counterparts.

5. CONCLUSIONS AND RECOMMENDATIONS

Conclusions

Albania's EU accession process has played a significant role in the evolution of its tourism policies, particularly in promoting sustainable tourism practices. Albania has implemented a comprehensive policy framework through its integration process to connect its tourism industry with EU sustainability standards. The country demonstrates its environmental commitment through significant policy advancements which include the introduction of environmental impact assessments alongside waste management regulations and tourism operator eco-certification programs. The country has boomed with successful sustainable tourism models in Theth and Gjirokastër where community-based tourism and eco-friendly accommodations have flourished.

The pursuit of sustainable tourism faces ongoing obstacles despite the positive achievements to date. The outcomes of this research demonstrate that the application of environmental policies varies across different regions with remote places and fast-growing development areas showing the highest inconsistencies. Inadequate infrastructure along with restricted stakeholder involvement weakens the government policies that aim to foster sustainable tourism. Many tourist destinations in Albania lack proper waste management systems which along with the absence of eco-friendly transportation options creates barriers to reducing the environmental impact of its expanding tourism sector. The tourism industry operates in pieces which makes it difficult for the government and private businesses and local communities to work together effectively toward sustainability goals.

Recommendations

Based on the study outcomes, the following set of recommendations has been developed to enhance sustainable tourism growth in Albania:

Regulatory Enforcement Strengthening. The primary difficulty discovered during this research was the insufficient enforcement of environmental regulations. The solution for Albania includes making significant investments to establish better monitoring approaches which track environmental standard compliance. The country needs to develop independent bodies or agencies which will monitor environmental impact assessments and enforce sustainability guidelines for every new tourism project along with the implementation of penalties for non-conforming facilities. Local municipalities require additional enforcement capabilities to oversee waste management rules along with pollution control standards and eco-certification requirements to safeguard nationwide sustainability standards.

Infrastructure Investment Enhancement. The tourism sector in Albania faces obstacles due to unavailability of proper waste management systems and eco-friendly transportation networks. The sustainable development of green tourism requires immediate financial investment into infrastructure projects. The government needs to establish eco-friendly transport systems in major tourist areas by implementing electric buses and bike-sharing schemes which would help decrease the environmental impact of tourism.

Governments need to extend their investment in waste management infrastructure which includes recycling centers and waste-to-energy facilities to handle the continuous growth of tourist numbers in coastal and rural areas.

Encouraging Public-Private Partnerships. A fundamental recommendation involves establishing partnerships between government authorities with tourism operators from the private sector and local communities. Sustainable tourism practices need public-private partnerships to grow while implementing green policies successfully. Tourism businesses receive governmental support through incentive programs which include tax exemptions and financial grants to promote their adoption of environmentally sustainable practices. The combination of private operator investments in sustainable tourism programs with active community involvement in regional tourism decision-making will produce more effective sustainable tourism strategies for Albania. Local communities together with private operators should join forces to develop an integrated approach for sustainable tourism development throughout Albania.

Promoting Awareness and Training. The establishment of broad-based support for sustainable tourism demands both educational awareness programs and training programs for tourism stakeholders. The majority of small and medium-sized tourism operators in Albania do not understand the lasting advantages of sustainable practices because they do not have the ability to establish these measures. Educational programs combined with workshops organized by government bodies in partnership with NGOs and industry groups should promote sustainability in tourism. The training programs need to

concentrate on delivering knowledge about eco-certification alongside effective waste management and energy-saving methods and community involvement strategies. Through providing tourism businesses with proper knowledge and resources for green practices adoption Albania will develop a more sustainable tourism sector. The country of Albania needs to optimize its access to EU financial support that funds green tourism development. The European Union provides several funding programs which include the European Regional Development Fund (ERDF) together with the Instrument for Pre-Accession Assistance (IPA) that support eco-friendly infrastructure development and sustainable tourism project implementation. Through EU technical assistance programs Albania can improve its tourism sector capabilities and enhance governance and regulatory systems. The adoption of these funding programs will enable Albania to speed up its transition toward sustainable tourism practices while decreasing its dependence on domestic resources.

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Conflict of Interest / Çıkar Çatışması

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Lean Management Efficiency And Innovation In The Back Office Of A Financial Institution

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Abstract: In today's fast-paced world, where agile working methods are increasingly prevalent in software development and customer service, innovation is also needed in the back office. The workload in the back-office areas of banks is increasing to such an extent that the previous bureaucratic management model can no longer handle it. There is a clear need for change, and, in the current view, the most effective solution is Toyota's method, Lean Management. Lean management has its roots in the Toyota Production System, which was developed in Japan in the mid-20th century. The basic idea of Lean management was born in 1947, when Taiichi Ohno, a chief engineer at Toyota, examined the material flow of factory production and decided that if customers buy a single product, it should be replaced immediately in the production process. Applying this logic, it follows that production is continuous if a company operates with strictly controlled inventory levels. This corporate management and operations model is a summary of the work of many others. The concept of Lean was created by James Womack and his research group within the framework of the MIT International Automotive Program in the late 1980s. This study examines the application of Lean methodology in the back-end operations of a Hungarian financial institution through in-depth interviews. The results provide a good starting point for other businesses and economic actors to improve their processes by prioritizing customer satisfaction alongside cost savings.

Keywords: Lean, bank, back office, value creation, cost savings

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1. INTRODUCTION

The indicator of the thesis was an expert colleague of mine who questioned the content of a previous study of mine, according to which the Lean methodology is not an agile working method. My answer was clear, because I consider Lean to be an agile method, since it serves exactly the same purpose as any agile operating model. Lean management is a philosophy and methodology that focuses on optimizing value-creating processes and minimizing losses.

Below I present the principles, history, application areas and practical examples of Lean management based on Hungarian and foreign language sources. After that, I prove through interviews with three different people that Lean management is an agile methodology that, with its tools and characteristics, supports agile adaptation to a changing environment.

James Womack:

"A systematic approach to identifying and eliminating waste (non-value-added activities) through continuous improvement by flowing the product at the pull of the customer in pursuit of perfection." (Womack & Jones 2003)

The word lean is an English word meaning slim. Its essence is to organize the operations of a given company in a lean manner, i.e., to prevent the company from being "obese." A company is lean if it rids its processes and working methods of losses, thereby achieving customer satisfaction and cost savings.

Lean management aims to create the greatest possible value for the customer using the least possible resources, time, energy and effort. This approach can be applied not only to manufacturing but to all business processes, including services and the healthcare sector.

This drive for economy and efficiency is not new in human history. Although Lean as a management philosophy only emerged in the 20th century, it has antecedents dating back to the Middle Ages.

A few decades ago, Lean management burst into public consciousness with its radical novelty, which soon spread to all areas of the economy, and is now considered a benchmark by both managers and quality development experts in production and service. Many companies do not simply consider Lean as a methodology, but also as a tool for shaping corporate culture. Most importantly, it has become a new strategic management method for multinational companies (Tóth & Zéman, 2018). It has expanded not only to production processes, but also to management activities that encompass the entire company's operations (Losonci, 2010).

Its goal is to create real value for the customer and reduce waste during the creation of the product/service, i.e. eliminating activities that are of no value to the customer. It is associated with cost savings, improved lead times and reduced complexity of operations. (József Poór, et.al. Management Consultancy in Central and Eastern Europe)

The basic ideas of Lean management were described by Womack and Jones (1996), who formulated the five pillars of Lean philosophy as follows:

- *Value: what are the values that represent value for the customer.*
- *Value process: the individual steps of the production process must be defined.*
- *Flow: the production process must be designed so that it contains only value-creating steps as much as possible.*
- *“Pull” principle: applying the “pull” principle at every step where continuous production is feasible.*
- *Improvement: continuous improvement taking into account changes in customer needs.*

The goal of these five steps is for the company to ultimately produce with excellent quality, low price, cost-effectiveness, short lead times, high levels of safety, and an excellent organizational culture. In connection with this, it can be stated, Lean is an independent management philosophy that encompasses the entire organizational operation, while also serving as an important part of corporate quality management, thereby acting as a key factor in achieving organizational excellence (Berke, 2024).

The future of Lean is unpredictable. We cannot know when a new philosophy will emerge that reflects the values of Lean, focuses on new perspectives, and brings even more results. The evolution of Lean can already be outlined, just like that of agile operating models (Tóth, 2021). It may be with a new name, or new ideas may emerge within Lean, but one thing is certain: it is increasingly based on efficiency and strives for continuous improvement of effectiveness. (Vörösmarty et.al. 2010.)

However, Lean can be considered both a philosophy and a more or less formalized system. For example, IBM had a system very similar to Lean called the Global Delivery Framework (GDF) (Bose et al. 2008).

Lean management develops into the company's strategy those tools that appear at operational levels and are most capable of supporting the achievement of specific goals.

It is true that the foundations of Lean support the development of high-productivity activities (assembly line work), and many of the principles and tools can be transferred to, for example, procurement processes. The only limit to the use of the tools is creativity (Vörösmarty et al, 2010; Szeberényi, 2016).

In his book Lean Startup, Eric Ries (Ries, 2011) presents a methodology for start-ups that leads to faster implementation and success of new products. It is based on the Build – Measure – Learn triad, where a first working viable product (MVP – Minimal Viable Product) is built. It is an interesting fact that this approach also appears in agile work methodologies. (Deák, 2023)

Creating real value for the customer and reducing losses during the production of the product/service, i.e. eliminating activities that do not add value to the customer. This, of course, goes hand in hand with cutting costs, improving process turnaround times, and reducing the complexity of operations. (Poór József, 2016) Lean focuses on eliminating redundancies in activities, which supports efficiency (Balogh, 2019). Furthermore, even if it is rarely noted, the efficiency focus of the lean philosophy strongly overlaps with the concept of environmental or eco-efficiency, a key aspect of corporate sustainability (Harangozo, 2008).

Lean therefore focuses on value-creating processes and is based on two basic principles. One is respect for people, the other is the elimination of losses. (Budai, 2017). Regarding the issue of the agile values of Lean, the Project Management Institute's Agile Practical Guide classifies almost all agile methodologies into a large Lean package. According to Czikán (2020), Lean can also be associated with the concept of outsourcing, meaning that companies often outsource functions and activities (Mihalkovné, 2024). An approach that helps the company to carry out production more efficiently, all with less time, space, and human resources (Blahó et al. 2021). In many cases, the application of Lean in many companies already reflects the corporate culture (Baksa et.al. 2021). In the field of organization, the new philosophy of Lean production, logistics, the supply industry and service are gaining an increased role, reflecting a fresh approach to repair and maintenance (Göndöcs, 2018).

It can be seen that Lean management has become very important in production management and operations management (Demeter et.al. 2011).

In contrast to the previous ones, Gelei (2013) considers Lean as one of the causes of supply chain vulnerabilities in her book.

In an article by McKinsey, the trick for food service providers is to link improvements to customer loyalty. For example, in one operator's kitchen, the introduction of Lean methods reduced the error rate and sandwich preparation time by 40 percent, labor costs by 15 percent, service times by a third, sales increased by 5 percent, and margins on affected products more than doubled, as employees could spend more time influencing customers and less time apologizing (McPherson & Mitchell 2005). According to Bod (2020), there are also lean governments that have quite limited public influence in society.

2. MATERIAL AND METHOD

The aim of this study is to provide a comprehensive picture of the effectiveness of Lean management applied in the back-office areas of financial institutions. This is based on the answers received from in-depth interviews, which were given by managers working in the back-office areas of the financial institution under study. The in-depth interviews were conducted in February-March 2025. In order to preserve anonymity, I will refer to the interviewees as Participant1, Participant2 and Participant3, and anonymous written responses were also received from four operational managers. I will analyze the answers to the in-depth interview questions by dividing them into categories.

The participants of the in-depth interview have been working at the financial institution for more than 10 years, currently in the positions of department head and department manager. Previously, they participated in the transformation project of the bank's back-office operations area as process development and analysis consultants. The project lasted from the beginning of 2021 to the end of 2022. Prior to the project, they worked in lower positions in the bank's back-office operations and in telephone customer service. Their experience, loyalty and attitude to work helped them to take on the role in the project.

3. Results

In the following, I will present the essence of the research, and based on the in-depth interviews, I will conduct an analysis of the introduction of Lean in the areas of the bank's back-office operations.

The need to apply Lean management

In these questions, I asked the participants to summarize the need for the application of Lean management in a few sentences in general. The most relevant answer I received was from Participant1, who said, *"Things work without it, you can develop without it, but with it, changes happen much faster, and in such a visible time frame, and the change is always timely."* In my opinion, the introduction of Lean can best be understood in its full depth in retrospect. When we see the results, not when we only receive promises. We know that the worst possible answer from an entrepreneur is that we have done it this way before, it is good, but that does not mean that it will not be simpler, more efficient, and more profitable after the introduction of the new method.

As the excerpt from the answer indicates, it is possible to work without Lean, the areas have worked before, however, once we experience the effectiveness of Lean and understand the reasons, much simpler, more flexible and more efficient work is created than before. Furthermore, based on the answer of Participant3, the best solution in the given area was to introduce the Lean methodology because it was an organization that worked with hundreds of processes, was constantly evolving, and managed increasingly complex processes. The goal was to reduce the large workload that had developed.

Motivation

In the motivation question, I asked what the driving force and motivation was for introducing Lean management in the given area. In this topic, I highlighted the detail from Participant2's answers, according to which *"The target vector under which the methodology was subordinated, from an organizational perspective, is competitiveness, futureproofing, adapting to the environment as efficiently as possible, personalization, immediate solutions."*

It is clear from the answer that Lean was introduced for professional reasons. However, summarizing the answers of the other interviewees, it can be stated that the information provided by senior management was not clear. For example, Participant1 answered this question that he did not really know the main motivation, the transformation team arrived in the area and had to adopt this line of thinking. In retrospect, it was understandable why, but the most important reason, which was born in the minds of the management, was not communicated transparently. This can make it somewhat difficult to master the thinking, since the main motivation is not in mind. It is commendable that the members of the transformation team have fully embraced this way of thinking regardless.

Specific goals

In this topic, I was curious about what goals managers generally set in each area when introducing Lean. According to Participant1, *"The main cornerstones are the move to digitalization, process optimization, and standardization. Standard processes that are easy for everyone to learn and train, everyone gives the same result and quality in the end."* Based on this, it can be stated that the introduction of Lean in this area was primarily intended to promote the optimization of processes. Although we are not talking about a manufacturing company, the assembly line-like work was thoughtfully

transformed into processes, which made it possible to filter out unnecessary activities and steps. This created the possibility of a faster learning period for new employees. It is known that in a large company, fluctuation is high, so special attention must be paid to training new employees.

Challenges

What challenges did the transformation team face in each area during the implementation of Lean? This topic occupied me with this question. According to Participant2, *"There is no transformation until the entire management team represents a unified direction."*

The responses show that the implementation of Lean methodology faces several challenges.

- a. The main challenge is management acceptance. Since the decision to introduce the methodology is made by management, the managers below them must be operationally involved in the project. They need to be properly converted, and this does not always work smoothly.
- b. Employees, those performing operational tasks, typically only hear cost reduction among the main reasons, which they believe will also result in a reduction in staff. The first thought is usually not that their own work will become easier, but that layoffs are expected.
- c. Lean is always introduced based on best practice. In this spirit, the transformation team selects the most efficient workforce and examines their processes. However, this employee must be made available to the transformation team, because of which the employee is dropped from the work process and a slowdown is expected. Understanding this is the task of the team leaders, which also does not always go without obstacles.

I read in a study that during the introduction of Lean, in order to convince employees of the value of Lean production, the Lean team introduced a simulation in which teams competed to build the best paper airplane, based on specifications invented by customers. This game implements the principles of Lean production, laying the foundation for deep and far-reaching changes in the production system (Swank, 2003). I was able to try this at an agile training course in Hungary.

Operational results

I was curious about general operational results in this topic. Participant2's answer reflects the results most accurately. *"The most operational result is transparent performance management."*

The answers clearly show that the fundamental result is the development of performance management. Employees report to their team leaders on a daily basis about the results achieved, obstacles, and progress is illustrated on various dashboards. This way, it is clear how the amount of work performed has changed in the recent period. These daily reports or daily starters may reveal best practices that further increase efficiency. Obviously, these reports are very challenging at first, as the employee feels that they are micromanaging their work, which they should otherwise do independently, but as the days and weeks go by, the employee sees the improvement in themselves and, compared to the other members of their group, is encouraged to perform even better.

The implementation of performance management has brought operational results in the field, such as reducing processes by half and increasing sales by 300 percent. These are significant results in themselves.

In my opinion, this means that the greatest result was achieved by introducing performance management, that's all.

Tools

In this topic, I was looking for what tools the transformation team or management used to measure the effectiveness of the project, and within that, which tools were popular and which were not liked by the employees (if any). According to the answer of Participant1, *"...the developments were designed in such a way that they always set up a reporting system so that it was constantly and transparently visible where they started and where they currently stand."*

The most important thing is to provide a metric for each goal, based on which you can measure where the team started and where it is going. For example, lead time, customer satisfaction measurement results. These KPIs (Key Performance Indicators) continuously show the results achieved.

I quote Participant3's answer to the question of the most popular tool: *"Loss hunting, workshops, when we put the clerks in the customer's position."*

According to all responses, employees involved in the Lean implementation particularly like events where they are asked about where they could increase efficiency in their work processes. They enjoy these events even if their work takes a bit of a backseat that day and they have to catch up. They feel important.

In the topic of the most popular tool, I received the answer from Participant3: *"Displaying individual performance"*, which is interesting because the interviewees also gave the same answer to the question of the most unpopular tool of Lean. According to them, the employees participating in the introduction of Lean management show the transparency of individual performance as the most unpopular tool. However, this process also goes through the change curve and after the introduction, it becomes a very accepted tool over time, because as we can read above, its introduction is one of the greatest achievements in the field.

Feedback

In the words of Participant2, *"It was a lot of work to start honest communication."* The responses unanimously indicate that the employees went through the classic change curve process during the introduction of the Lean method.

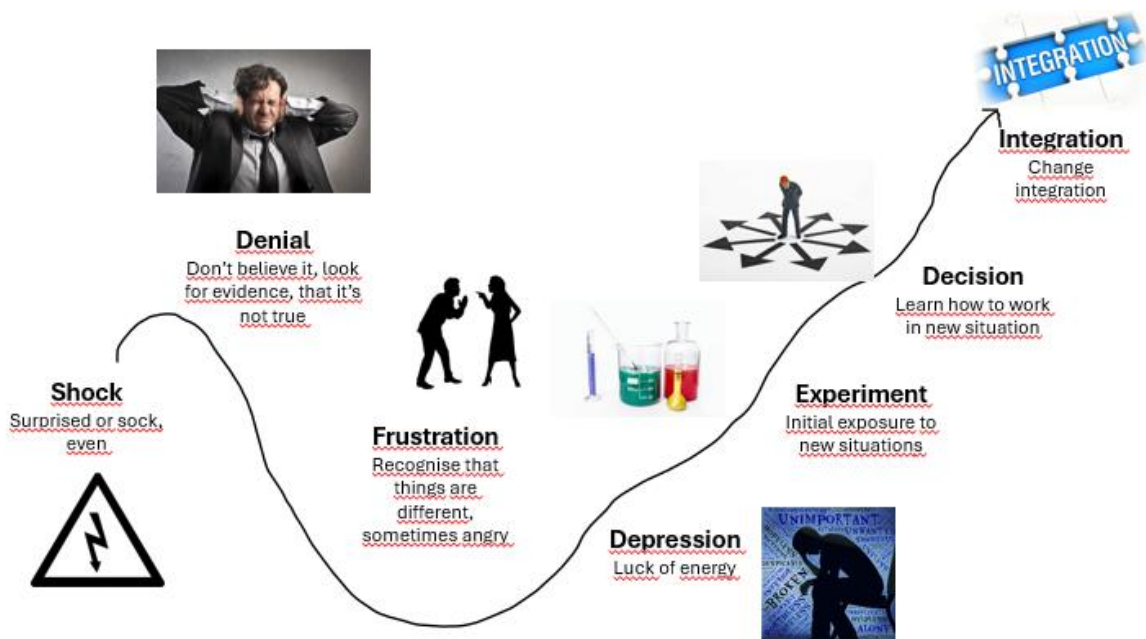


Figure 1 Self-made illustration based on The Kübler-Ross Change Curve — The Stress Less Company

The first reaction is always shock, what will happen now, they will fire you, followed by a strong denial, then frustration. The next low point is shown in the figure, depression, after which there is a gradual rise towards acceptance and integration.

According to the answers of the in-depth interview subjects, the path of the employees involved in the introduction of Lean is clearly visible on the change curve. It does not matter at which phase the employees are asked, but the points shown in the figure above are clearly confirmed.

The biggest task is to get the employees to honestly report on their own performance. In an area where up until now there has been assembly line work, everyone has done their own task, independent work is the expectation, it is not typical for employees to discuss bottlenecks or positive feelings with each other or with their team leader.

"Transparency is the key issue." The most important thing is the proper presentation. How management conveys this whole change to the employees, whether they can properly convey it, whether they can put on "Lean glasses". The success of such an innovative project introducing the Lean process depends critically on the management's active involvement and continuous communication throughout the entire implementation and after the transformation (Balogh, 2024).

Continuous development

According to Participant3, the right question is always *"...if this were my business and I were the administrator, would I be satisfied with it?"* So, the most important thing is always to create value. After the Lean implementation project is completed, there must be a workforce in the given area who can ensure Lean thinking in the long term. Obviously, the transformation team carries out follow-up, and this is also the case in the case of a consulting company, but it is no longer day-to-day support. That is why the employees in the area must use those "Lean glasses".

Employee satisfaction

"Concrete and direct feedback to the managers." According to the answer of Participant2, employee satisfaction is measured during employee satisfaction measurement, which, according to the quote above, is a feedback that clearly shows which stage of the change curve the organization is currently at. Based on this, the manager has the opportunity to take steps and set up action groups. It is important that these action groups also come from our own employees, as this is how we can increase their self-confidence and sense of importance.

Employee satisfaction measurement is clearly an important moment of this change. Feedback must be constantly requested from employees, which shows whether they have understood and accepted the reasons for the change. Given that one of the essential reactions to the introduction of Lean Management is resource reduction and workforce reduction, it is important to assure people of the opposite. And this is the only way to do this in a larger organization. Anonymity is also an important aspect in this case. Without a name, it is easier for management to receive information, and it is easier for employees to express their thoughts and feelings.

4. DISCUSSION AND CONCLUSIONS

Lean management is an effective methodology that can help companies optimize their operations and meet customer needs. The application of Lean principles can be effective not only in manufacturing, but also in many other areas. This is also shown by the responses received from the participants of the in-depth interviews. The efficiency in the bank's back-office operations has increased significantly, resulting in savings of several million forints, increased revenue, and increased employee satisfaction.

It can be clearly stated that, even though Lean is optimized for the processes of a manufacturing company, it can also be applied in the financial institution sector. The background operational areas cover business processes, from which they free those administrators who actually create value for the company, such as bank branch or telephone customer service administrators. This is proven by István Jenei's (2010) study on the effectiveness of applying Lean tools in healthcare. Based on 16 cases, he proved that non-productive areas can still achieve positive results in these areas.

In today's changing VUCA world, we cannot predict the number of tasks, only that they will not decrease. It seems that the best solution to deal with this is to introduce Lean Management.

Lean is therefore an agile work methodology that supports operations by prioritizing the values of the customer and employees.

Ethics Committee Approval

N/A

Peer-review

Externally peer-reviewed.

Author Contributions

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Conflict of Interest

The authors have no conflicts of interest to declare.

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The Role Of Science And Technology Parks in Regional Innovation, Development And Social Cohesion

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Abstract: Science parks and innovation ecosystems are important actors for economic and technological development, as they foster innovation and collaboration between research institutions, businesses and government, in line with the Triple Helix model. The aim of this study is to analyse the role of science and technology parks in the development of innovation ecosystems, the improvement of the region and the impact of the science parks on social cohesion. We hypothesise that science parks and innovation areas serve as platforms for cooperation between different actors (industry, academia and government), thus boosting the region's innovation performance and strengthening social cohesion through their social connectedness activities. The research methodology will go beyond a theoretical perspective to identify science and technology parks with a leading level of networking and thus a high regional and societal impact, and to identify their operational strategies. The expected results will provide a comprehensive picture of European and globally located science and technology parks that are well networked, which will allow valuable management conclusions to be drawn for other parks. The empirical part of the research will also be based on a comparison with the results of the Global Survey of the IASP, which will provide further recommendations for successful networking. The study is unique, as research on science parks has so far analysed parks at the collaborating level to a lesser extent, with a view to drawing strategic conclusions on strengthening social unity and creating innovation ecosystems.

Keywords: science park, innovation ecosystem, development, social cohesion

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1. INTRODUCTION

Science and technology Parks are not only catalysts for technological development, but also founders of regional innovation ecosystems, through which they carry out significant networking activities. In line with the framework of the Triple Helix model, they promote innovation and cooperation between universities/research institutes, industry players and government agencies, thus fundamentally determining economic competitiveness and the growth of social welfare. The knowledge and research results generated by science parks contribute directly to industrial innovation, the development of new technologies and economic growth.

The relationship between society and science and technology parks is not only realized through joint research projects and knowledge transfer but is also of paramount importance for attracting and retaining talent. In line with this, the study aims to analyse the role of science and technology parks in the development of innovation ecosystems, the development of the region and to examine their impact on social cohesion.

We assume that science parks and innovation areas serve as platforms for cooperation between different actors (industrial, academic and public), thus boosting the innovation performance of the region and strengthening social cohesion through their socialisation activities. In addition to the theoretical outlook, the methodology of the research is to find out those science and technology parks and their operational strategies that have a high level of networking, thus having a significant regional and social influencing role.

The study is a novelty, as research on science and technology parks has so far been less likely to analyse parks at the network level in order to draw strategic conclusions for the analysis of the parks' operating environment. The empirical part is based on a comparison with the results of the Global Survey conducted by the International Association of Science Parks and Areas of Innovation (IASP), which provides further recommendations for successful networking. Based on the expected results, a comprehensive picture will be created that can provide valuable management methods for other science and technology parks.

The strategic location of the parks and the business incubation activities taking place in them are essential to encourage dynamic start-up activity. The number of employees and the internationality of the settled players both contribute to the increase in turnover, while the diversified economic environment creates the foundations for innovation and sustainable growth.

2. MATERIAL AND METHOD

2.1. Theoretical outlook

The model highlights the growing role of the university in the transition to a knowledge-based society and the importance of the interactions between industry, government and academia, points out that although the Triple Helix model is controversial due to its normative nature, it provides an important framework for the operation of innovation systems on both a theoretical and practical level. The foundations of the Triple Helix model are highlighted through Georg Simmel's triad theory and Schumpeter's entrepreneurial concept and institutional logics. The triad theory comes from Georg Simmel and emphasizes that relationships between three actors allow for more complex and dynamic cooperation. The entrepreneurial concept is based on Schumpeter's theory that innovation requires entrepreneurship. Institutional logic describes how different organizational and social norms can be harmonized in innovation processes. (Cai & Etzkowitz, 2020)

(Shikhli, et al., 2024) the Triple Helix model emphasizes the dynamic, complementary cooperation of three main actors (academia, industry and government), where each party actively participates in problem creation, regulation, research and implementation. The model is particularly suitable for science and technology parks, because these parks are built on just such a triad of collaboration: the university contributes to innovation through research, industry through product development, and the government contributes to innovation with regulations and resources. The article shows how the model can overcome the challenges between knowledge transfer and organizational differences, and how it supports open innovation. According to the authors, the success of science and technology parks depends on their ability to operate, integrate and motivate the established actors according to the Triple Helix Model, especially in international projects where cultural and structural differences must also be addressed.

The Triple Helix model can be understood not only in terms of science and technology parks, but also at the level of innovation ecosystems. Initially, the strong role of the state was observed in his research, so the role of the government has created a system that encourages innovation. The industry must use this incentive system effectively and facilitate the flow of knowledge and technology between industries. The development of the model is the "laissez-faire" concept, in which the role of the state is not emphasized, all actors are equal, but the relationship between them is still based on competition. The final step in the development of the model is the interactive Triple Helix model, which focuses on a close, trust-based long-term partnership between the three actors. (Horváth, 2021)

(Kunwar & Ulak, 2024) This article shows how the Triple Helix has expanded into the Quadruple (civil society) and Quintuple (natural environment) Helix models. The Quadruple Helix places special emphasis on social inclusion, democratic knowledge and cultural aspects. Quintuple Helix is already integrating environmental and sustainability goals into the innovation ecosystem. Another focus area is the study of the development of innovation models and their role in knowledge-based societies and economies. It also highlights the increased role of academia in the creation of knowledge, especially in responding to the challenges of sustainable development. Mode 1, 2 and 3 discusses how the creation and application of knowledge has changed through the interpretation of forms of knowledge. Mode 1, 2 and 3 forms of knowledge denote different ways of creating knowledge: Mode 1 is traditional, science-centred, Mode 2 is application-oriented and interdisciplinary, while Mode 3 is a collaborative form of knowledge that integrates social and environmental aspects. These models show how the production of knowledge has become increasingly open, practice-oriented and socially accepted. The production of knowledge has become decentralized, inter- and transdisciplinary, and increasingly based on social inclusion and sustainability goals. The authors emphasize that cooperation between different actors is essential for the socio-technological transition. Overall, this model system offers a complex and integrated framework for sustainable innovation in the future.

(Zakaria, et al., 2024) His work helps to understand the structure of the knowledge-based economy, especially in the context of developing countries. Social and environmental aspects play a significant role in the development of innovation strategies, and their development is also influenced by community participation and the use of digital tools. The research makes proposals for the expansion and theoretical development of the application of helix models.

In recent decades, science parks have been the engines of regional development, but there is little literature to measure this. To complement this gap (Blazquez, et al. 2023), they examined the social values in science parks and analyzed how these values are distributed among the settled actors. The methodology used in this study consists of four main steps. During the primary data collection, the names of the companies operating in the science parks, their number of employees, and then the financial and control information related to the companies were also collected. This data was filtered based on a variety of criteria, including the legal form of the companies, their main activity, the availability and completeness of the data. This was followed by an estimation of the social value taking into account the stakeholders (customers, employees, suppliers, authorities). Social value means something different to each person involved, for customers this value can be derived from sales, for employees from wage costs, and for the public sector from taxes and contributions. These steps encourage us to take into account the social values that a science and technology park generates for stakeholders, thus estimating the monetary value of contributing to society. Determining this is cardinal for each park, as

this way the results obtained can be compatible with their own social and economic goals and thus the differences can be mapped out, through which development proposals can be formulated.

Further studies confirm the positive impact of the establishment of science parks on the development of the region and social cohesion., science parks stimulate innovation and entrepreneurship by supporting knowledge-based companies, which can lead to the region's economic development in the long term. Science parks also provide a platform for knowledge exchange, and through their modern infrastructure, they improve the attractiveness of the region and generate new investments. The study also discusses the role of science parks in retaining young people. (Dobrosavljević* & Živković, 2018)

(Chan & Pretorius, 2007) As early as the 2000s, the technologically innovative power of science parks was recognized, and innovation and networking were considered to be two key factors that ensure the competitiveness of the next generation of industrial clusters in globalization. Based on the definitions and characteristics of science parks in various studies, networking is considered to be one of the most important benefits that science parks can offer to their resident actors, as the necessary technological capabilities can be built through these networks.

The example of the Matanzas Science and Technology Park in Cuba also proves the economic and social impact of science parks, as projects starting from science parks develop social development at the government's suggestion (Arencibia, et al. 2023). To assess the social impact, the study recommends a training for participating project managers to ensure that projects in science parks actually deliver the expected social outcomes. The current development not only improves the social results of science parks, as in this case science parks were established as part of the country's digitalisation policy, and they also increase the research and development activities of the regions.

(Vasvári, et al. 2020), science parks appear as an infrastructural element of the local innovation ecosystem, who implement successful knowledge and technology transfer activities between innovative industry and universities and research institutes. Based on the international examples processed, the work of Vasvári et al. emphasizes the role of universities in relation to science parks for the development of innovation ecosystems, and proposes the development of young people's assertiveness, risk-taking ability and independent thinking.

In order to lay the foundations of the thematic area, the present research reviewed the framework of the Triple Helix model, presented the Quadruple and Quintuple Helix concepts, and then covered the constructive effect of science and technology parks on the social and innovation ecosystem. Based on the theoretical outlook, we assume that parks operating on the basis of the Triple Helix model are more likely to develop an operating model in which networking and the operating environment are important elements.

2.1. Methodology

The empirical part of the research is based on the results of the IASP Global Survey, in which 113 international science and technology parks participated. In order to give a complete picture of successful networking and its relevance, the following attributes were analysed: location of the parks, business incubation activity, turnover, number of employees, internationality of the settled actors, activity of the park start-up. For the sake of complexity, the ratio of these factors to the population or the number of employees is also described, thus showing the characteristics of the operating environment of science and technology parks.

3. RESULTS

In order to examine the regional, economic and social impact of science parks, the topic area will be established in the first round with the help of descriptive models. The results of the examination according to the above six aspects can be explained below.

Location

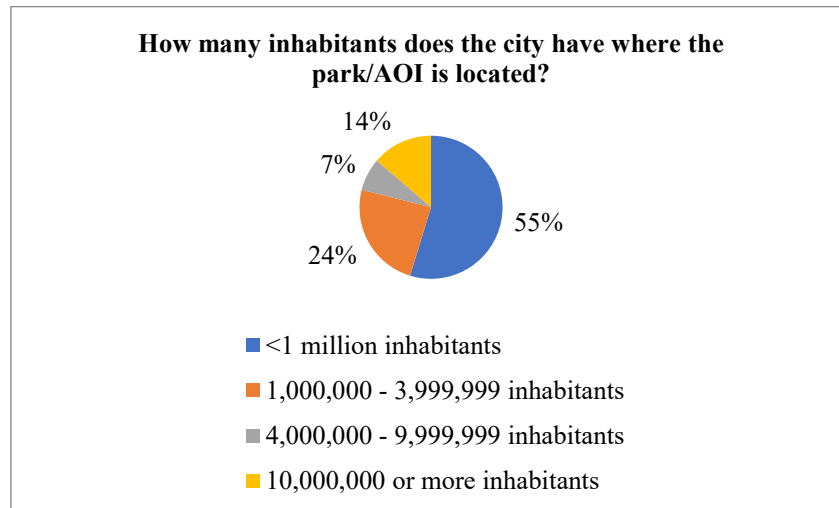


Figure 1: How many inhabitants does the city have where the park/AOI is located?

Source: own editing based on IASP Global Survey results

113 science and technology parks participated in the research, 84.07% of which are located in a given city, with a population of less than 1 million in 55% of the cases, but cities with a population of 1 to 4 million often serve as locations for science and technology parks with 24%. The population of between 4 and 10 million is present in 7% of the research, while parks with a population of more than 10 million people appear in a higher number, in 14%. Science and technology parks in the highest category have more opportunities to connect with the external environment, so presumably the reason for choosing the site of these parks is to exploit the advantages provided by a larger network of contacts.

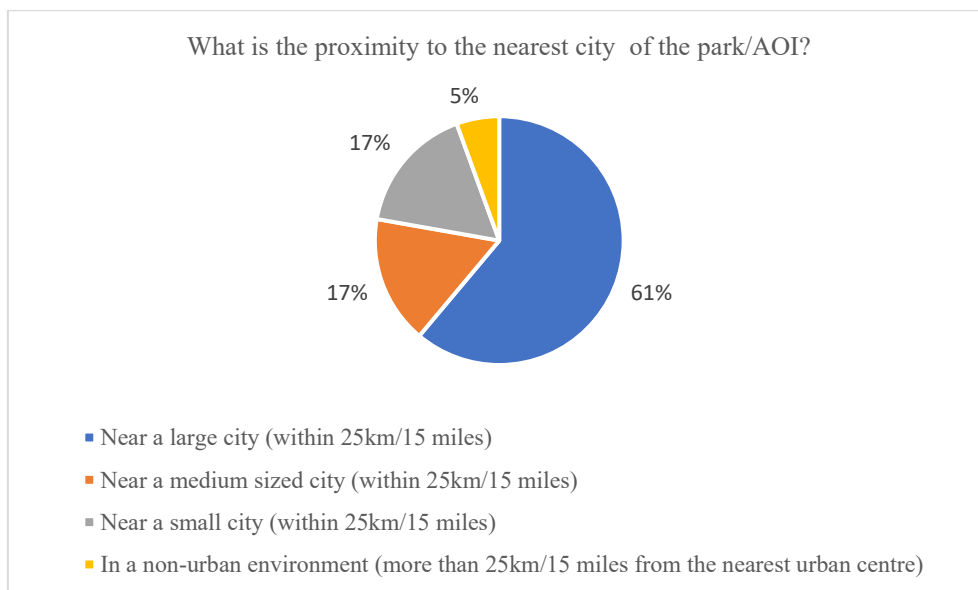


Figure 2: What is the proximity to the nearest city of the park/AOI?

Source: own editing based on IASP Global Survey results

The diagram shows the location of parks that do not operate directly in a city, but are located within a radius of 25 km from a small, medium-sized or large city, or in rare cases are located more than 25 km from the nearest urban region. The above research examined the proximity of parks to the nearest city, which is illustrated by the figure above, based on which it can be said that 61% of the examined parks are located in the vicinity of the nearest large city within 25 km, 17% are located at a distance of 25 km or from a medium-sized or small city, while a negligible group of participants in the research, 5%, are located in a non-urban environment. This means that a key element in the choice of sites for the science

and technology parks participating in the research is their proximity to the city, which carries clear infrastructural advantages.

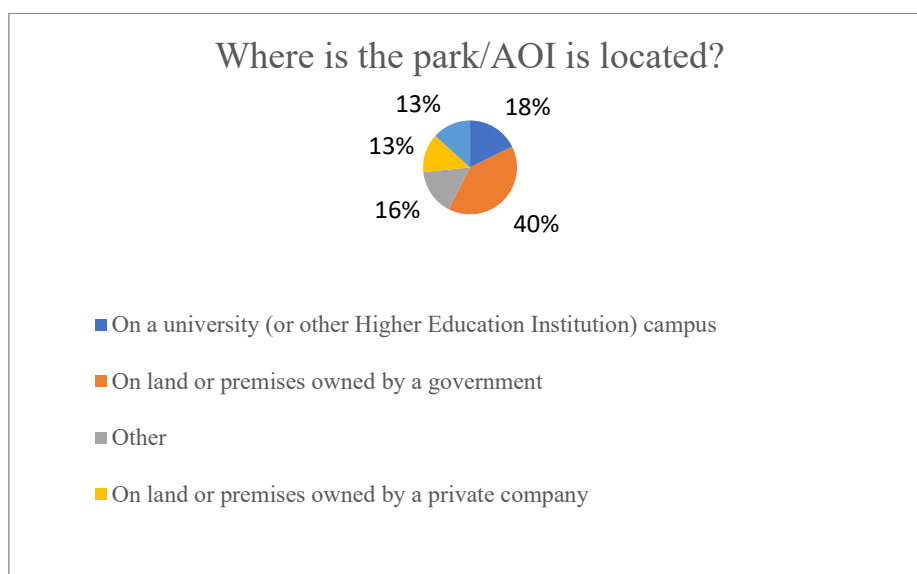


Figure 3: Where is the park/AOI is located?

Source: own editing based on IASP Global Survey results

The location of a science park is indicated by the area on which the park is located. In the majority of cases, 40%, the given parks are located in state-owned areas, but the university campus is also a determining location for science and technology parks (18%). In 13% of cases, other ownership relationships can also be named, such as private and public ownership or a science and technology park owned by the city. This is also the extent of the parks on the non-university campus, but owned by the university. A significant proportion of the involvement of the state and universities may be due to the fact that science and technology park initiatives started as public projects in most countries, so they were built on state- or university-owned land in the context of the Triple Helix model (71%).

Employed number

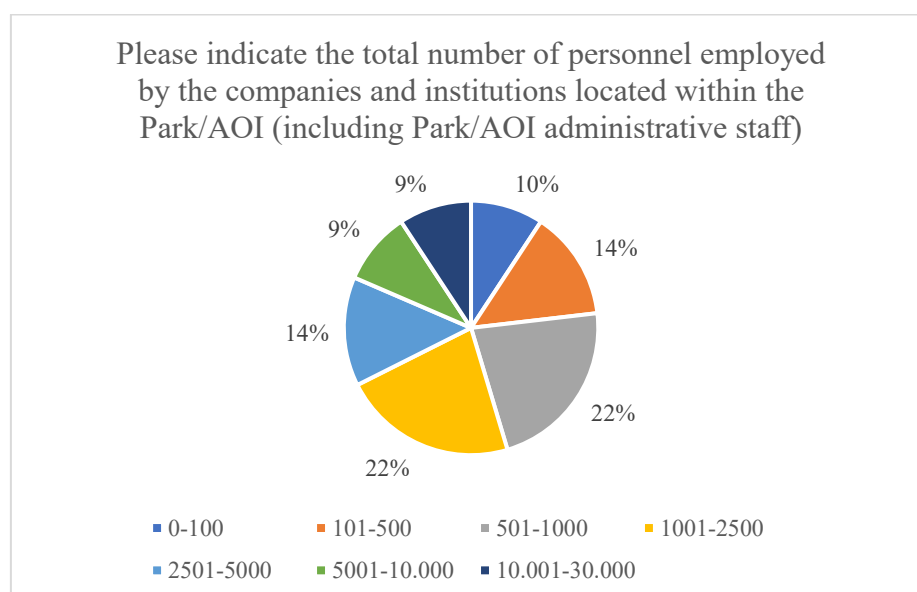


Figure 4: Number of employees in the park

Source: own editing based on IASP Global Survey results

In terms of the number of employees in science and technology parks, it can be said that 24% of the parks have less than 500 employees, nearly half (44%) of the parks employ between 500 and 2500 employees, but intervals with 2501-10,000 employees are also present in 23%, while 9% of the parks employ 10,001-30,000 employees. It can be seen that 19% of the parks employ more than 2501 people, which means that parks with a large number of employees play a prominent role in reducing unemployment, so their presence has a perceptible impact on the economy of the given region.

Turnover

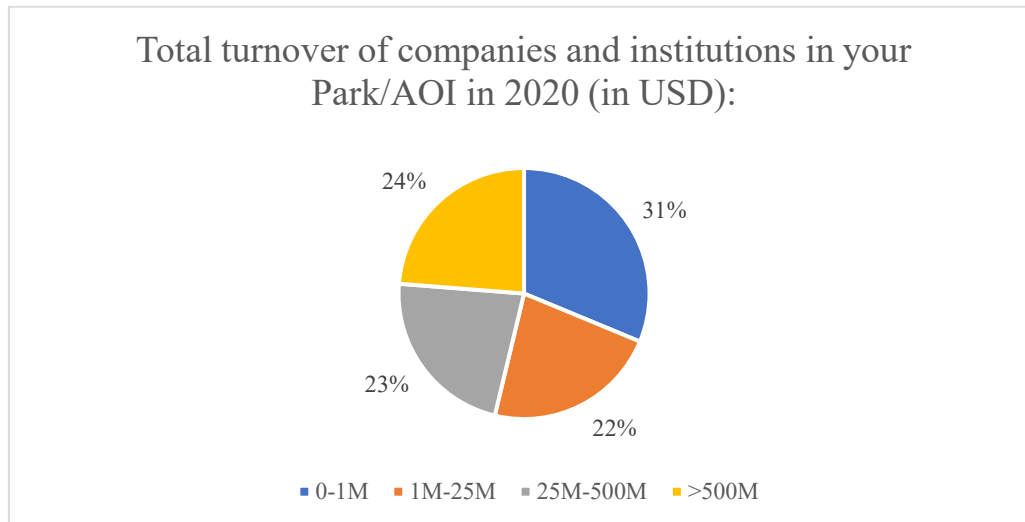


Figure 5: Science and technology park turnovers in USD

Source: own editing based on IASP Global Survey results

In the case of science and technology parks included in the database, there is no significant difference in the distribution of categories with a positive value in terms of their annual turnover. Most parks (31%) fall into the turnover category of less than USD 1 million, but it is surprising that the number of categories 1-25M USD (22%) and 25-500M USD (23%) are almost the same, and a larger number (24%) of science parks are located among the parks generating turnovers above 500M USD. Based on the diagram, it can be said that there is a large number of parks whose annual net sales turnover falls into the highest income category, so these parks greatly contribute to the development of the region through their taxation.

Incubation

The incubation activity is described in the following three diagrams.

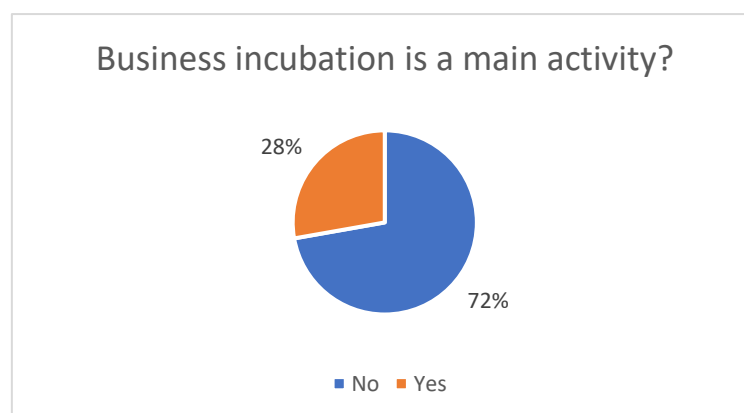


Figure 6: Business incubation is a main activity?

Source: own editing based on IASP Global Survey results

More than a quarter (28%) of the science and technology parks surveyed list incubation activities as their main activity. Incubation activities have gained great importance in the recent period. In most parks, the main source of income is rental (offices, auditoriums, laboratories, various social rooms), and the emphasis is on supporting start-ups.

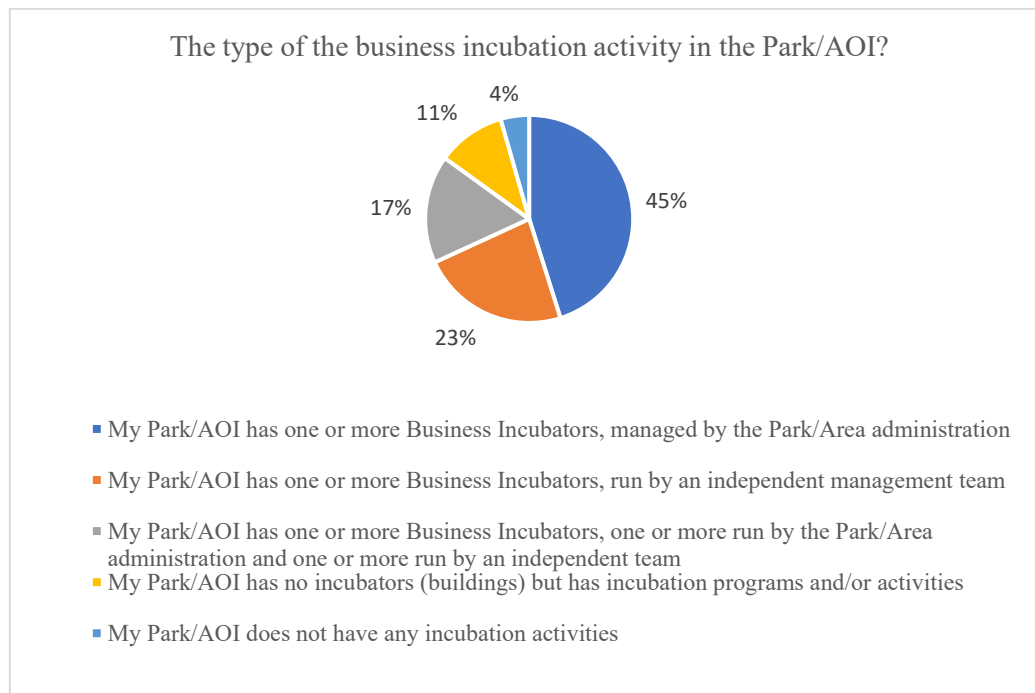


Figure 7: The type of the business incubation activity in the Park/AOI?

Source: own editing based on IASP Global Survey results

In addition to the previous chart, it can be said that almost half of the parks (45%) have at least one business incubator that is managed by the science or technology park itself, which is an outstanding result because here the business incubation activity can be attributed to the science park's own decision, which the management was able to successfully implement through its active role. In 17% of the cases, the park also felt that incubation activities were important, but the management did not have enough experience or capacity, so they created the processes in cooperation with the help of an external expert. In 23% of cases, the management does not participate in the coordination of incubation tasks but hires a completely independent company for this purpose. 11% of the parks do not have designated incubation buildings, but they organize programs aimed at incubation. The strength of the incubation activity of science parks is shown by the fact that only 4% of the parks do not have any such activity. The results prove that incubation is a relevant activity for the parks and there seems to be a strong intention to implement it (96%), but the degree of implementation differs for each park.

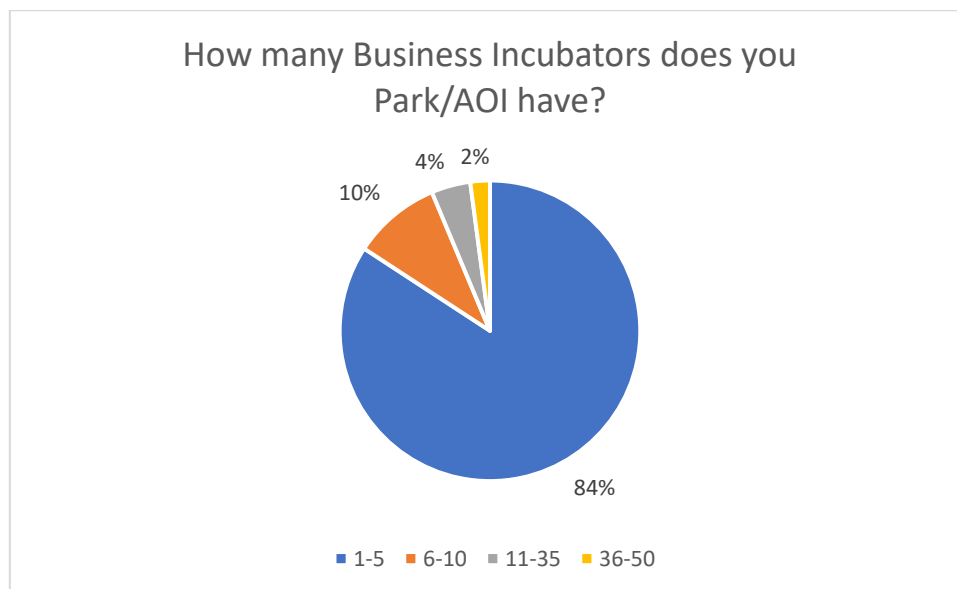


Figure 8: How many Business Incubators does you Park/AOI have?

Source: own editing based on IASP Global Survey results

As it turned out from the previous diagram that incubation activity is present in 96% of the examined science and technology parks, its distribution can be seen in the present figure. 83% of parks have between one and five incubators, and a sample can be observed among the following categories, as the more incubators are present in a given park, the smaller the number of that park.

Start up

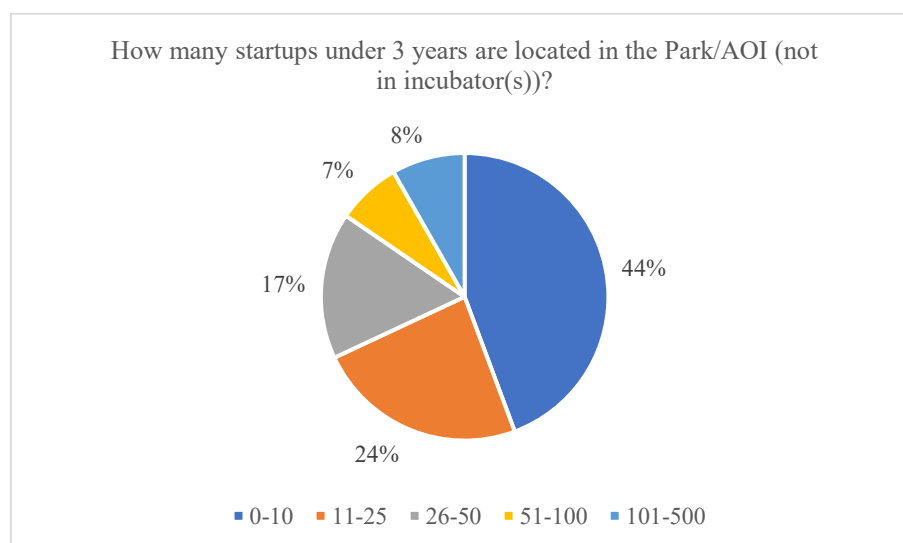


Figure 9: How many startups under 3 years are located in the Park/AOI (not in incubator(s))?

Source: own editing based on IASP Global Survey results

In addition to incubation activities, the parks also support the creation of start-ups. 56% of the parks surveyed operate eleven or more start-ups under 3 years of age, which are located within the science and technology park, which also shows the efforts of science and technology parks to increase start-up activity. It is surprising that 8% of the surveyed parks have established start-ups between 101 and 500 in their parks, and a similar proportion (7%) appears in the category between 51 and 100.

Internationality

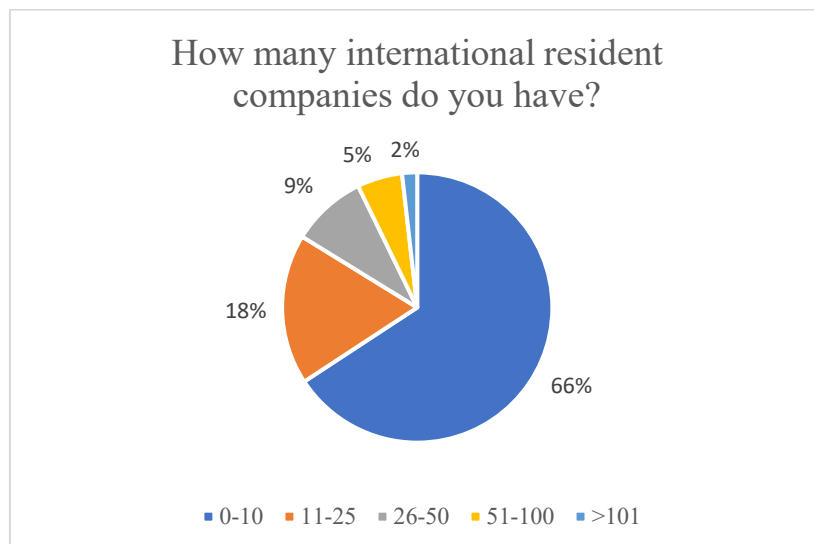


Figure 10: How many international resident companies do you have?

Source: own editing based on IASP Global Survey results

In addition to regional development, the economic activity of science and technology parks can also be perceived across borders, but presumably they will pay more attention to international relations when their regional activities are sufficiently established, so 66% of the participants register less than 10 resident companies in an international context, while 2% of the respondents are in contact with companies above 101 residents, 32% of them are resident companies between 11 and 100.

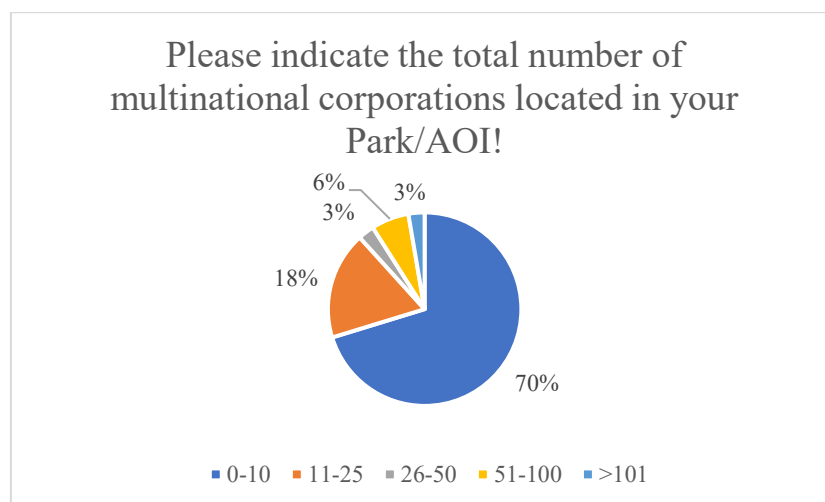


Figure 11: Please indicate the total number of multinational corporations located in your Park/AOI!

Source: own editing based on IASP Global Survey results

The proportions of the previous diagram are also reflected in the current figure, as 70% of the examined parks have a multinational connection between 0 and 10 within the parks. However, internationality is a very important aspect, as more than 9% of the parks can be said to have over 50 multinational cooperations.

Context

In the following, the relationship between the attributes described so far will be explored with the proportions of incubators, turnover, number of employees and number of start-ups per population. In addition to this, along the same lines, data related to internationality will also be proportioned to the number of employees in science and technology parks. We examine internationality because these two indicators are closely related to the analysis of the operating environment of parks.

Below is the relationship with the number of the population, in which case the participants of the research classified themselves into one of the following four categories:

- <1 million inhabitants
- 1,000,000 - 3,999,999 inhabitants
- 4,000,000 - 9,999,999 inhabitants
- 10,000,000 or more inhabitants

At zero, the data can be seen that parks have not published the number of people in their city but have made their incubation data available.

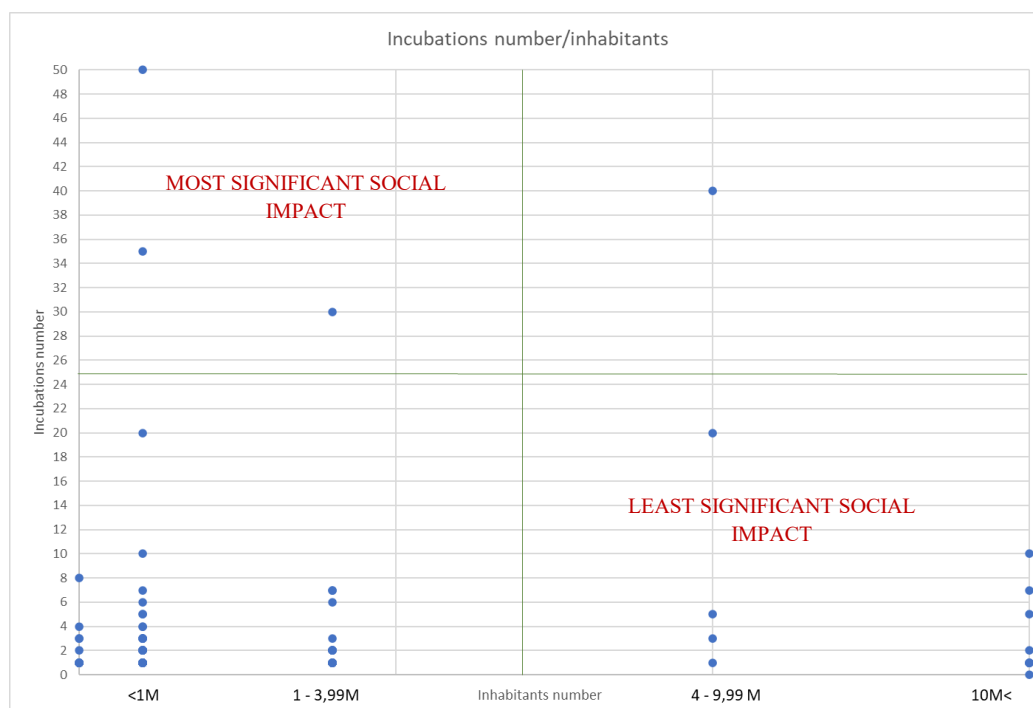


Figure 12: Incubations number/inhabitants

Source: own editing based on IASP Global Survey results

The figure reveals that there is an inverse correlation between the number of incubators and the number of inhabitants, since the category of population below 1 million people includes the most incubators, i.e. science parks located in a city with a population of less than one million people have the most incubator staff, accounting for 49.63% of all incubators. In this category, a science and technology park can also be named that itself registers 50 incubators, i.e. in terms of the proportion of the population, this park has the greatest impact on supporting incubation activities. The lower left quadrant is where the largest number of people are located, where the number of incubators is less than 25 and the number of smaller settlements (less than 5 million people) is located. It is an interesting fact that parks located in large cities with a population of more than 10 million have less than 25 incubators, and most incubators are those located in cities with a population of less than 1 million. It can be concluded that most parks are located in small settlements and have a small number of incubators. This may be due to the fact that the industry focus of smaller cities is more targeted, and it is more difficult to create a large number of incubators within one industry.

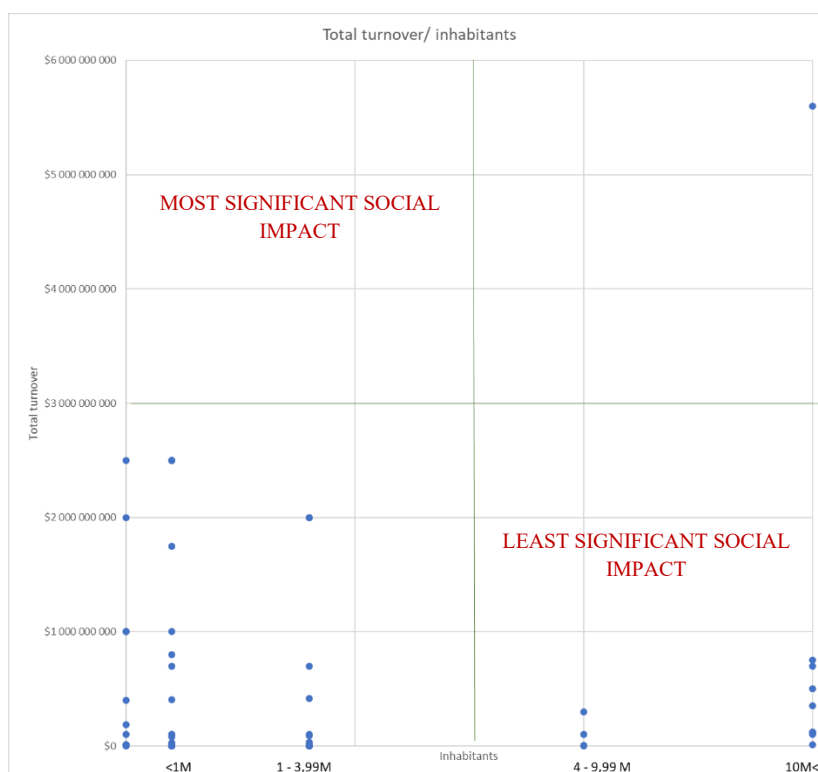


Figure 13: Total turnover/inhabitants

Source: own editing based on IASP Global Survey results

When comparing sales turnover and population, it can be said that the residential category below 3 million generated the highest turnover, but apart from one outlier, the turnover of the participating science and technology parks was below this, so the parks are concentrated in the lower left quadrant. The park that settled in the city with the largest population generated the highest turnover. On the other hand, it should be emphasized that the parks with a turnover below this level were located in the city with the smallest population. The results draw interesting conclusions, as a large settlement has more business opportunities, but does not provide the highest turnover.

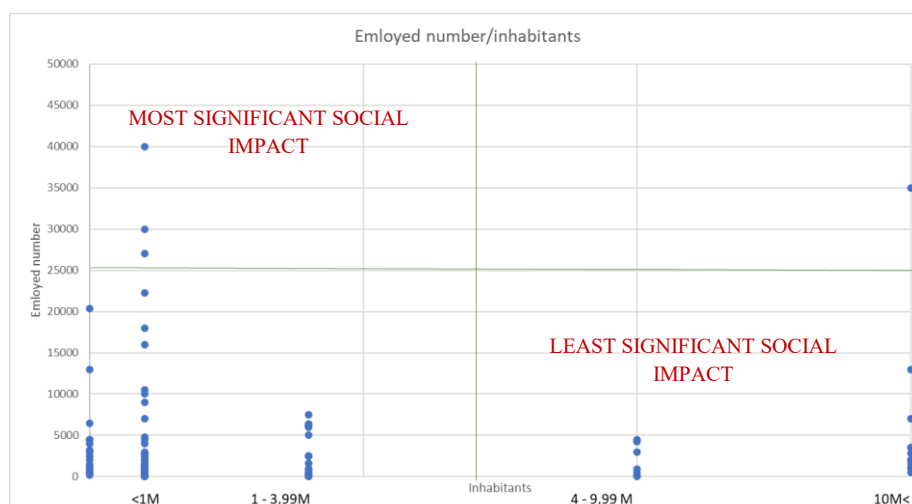


Figure 14: Employed number/ inhabitants

Source: own editing based on IASP Global Survey results

The data are concentrated in the lower left quadrant, i.e. the parks with less than 2500 employees and the population of the city in which they settled are less than 5M are represented. In a city with a population of 10 million, an outstanding figure can be seen, which may be due to the fact that the workforce is higher in large cities, but cities with smaller

populations can also attract science and technology parks with a large number of employees, as the universities present here strengthen the research activities represented by science parks.

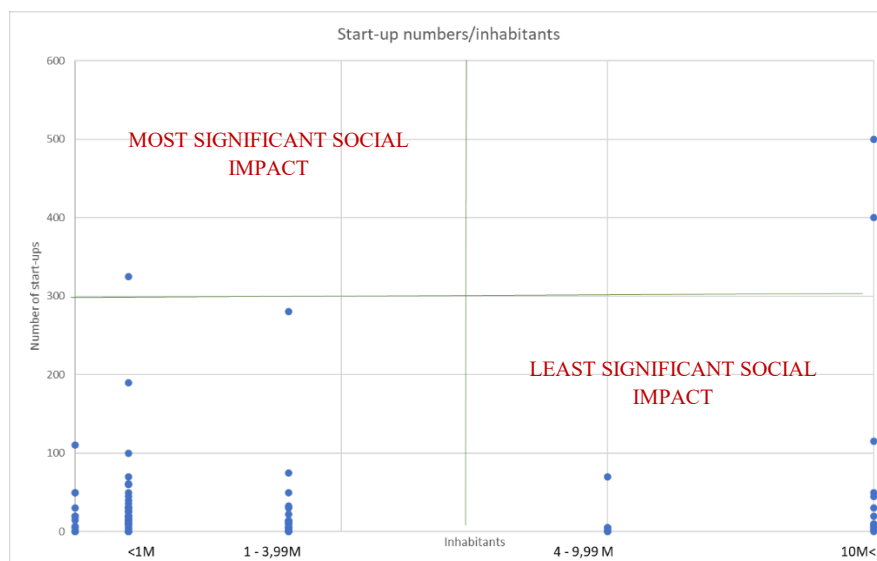


Figure 15: Start-up numbers/ inhabitants

Source: own editing based on IASP Global Survey results

There are significant differences in the number of start-ups relative to the population. In the case of most categories, the number of start-ups under 100 in science and technology parks under the age of 3 can be named, and the number of start-up initiatives can be named in the residential category of 4-9 million people. Parks located in cities with 10 million inhabitants have the highest number of start-up employees, which may be due to the fact that larger cities provide an operating environment that inspires the development of new ideas, but nevertheless, the data is concentrated in the lower left quadrant, presumably because start-up activity has become a growing trend in the last decade, which, however, must be preceded by well-founded strategic and financial processes.

In order to examine the economic and social impact, in addition to the data of the population, the information on internationality was also reconciled with the number of employees in the company.

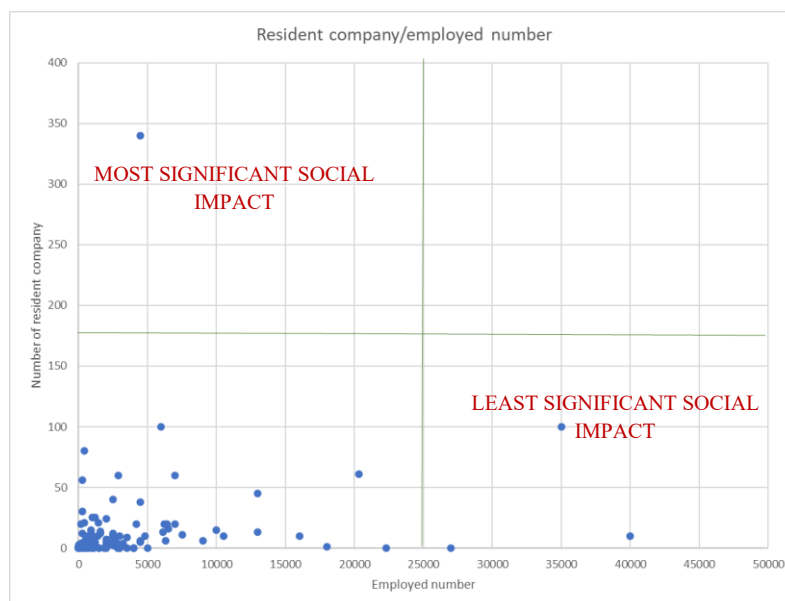


Figure 16: Resident company/employed number

Source: own editing based on IASP Global Survey results

Based on the figure of the number of employees of domestically resident companies, it can be said that the data are concentrated in the lower left quadrant, i.e. the small number of employees includes few domestically resident companies. The number of other science and technology parks is one of the most important parks among the participants in the research, which has more than 225 co-operation with domestically competent companies and employs more than 2500 people. In the lower right quadrant, there are a few science parks that already reach the number of resident companies with a similar number of employees with a higher number of employees, this may be due to the fact that they can more easily increase the capacity intended for internationalization due to the more employees.

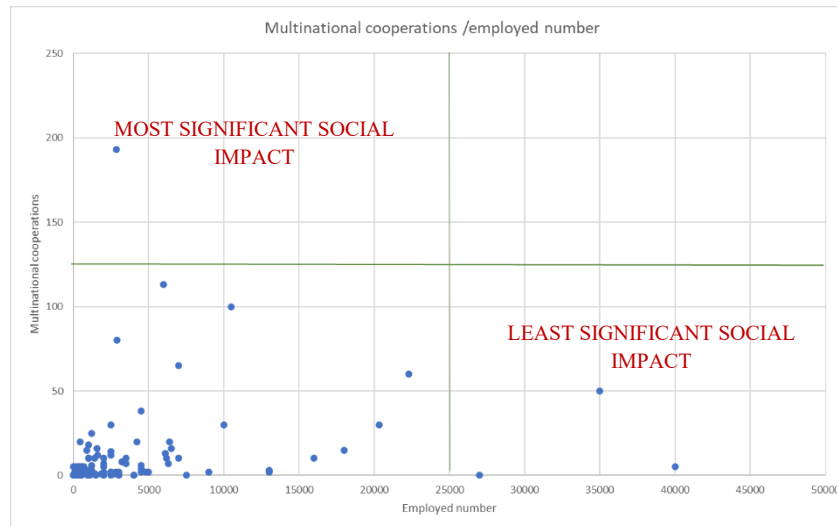


Figure 17: Multinational cooperations /employed number

Source: own editing based on IASP Global Survey results

A similar pattern can be drawn when examining international collaborations, the most typical of the examined science and technology parks is that their number of employees is less than 2500 and mainly they have international cooperation of less than 125. Compared to the previous figure, however, it can be stated that although most of the science and technology parks are located in the lower left quadrant, the data shown here are more scattered, i.e. the examined parks place more emphasis on international cooperation than on the establishment of resident companies, which may mainly be due to financial reasons.

4. DISCUSSION AND CONCLUSIONS

Both Cai and Etzkowitz emphasize the role of society in the success of innovation activities in the Quadruple and Quintuple Helix framework. However, based on Horváth's work, it is important to emphasize that equality and close cooperation between the actors are necessary for success.

Overall, it can be said that more than half of the studied science parks are located in cities with a population of less than 1 million, while 61% of the parks that are not located in a city are built within a 25 km radius of a large city. Based on these, it can be concluded that the proximity of science and technology parks to society is significant. This is complemented by the role of the state, the importance of which is also emphasized by Shikli and his colleagues, according to the results, 40% of parks are located on land owned by the government, thus further strengthening cooperation between actors. When analyzing the basic data of the parks, their number of employees and annual turnover were extracted, according to which they employ the most employees between 501 and 1000 people and have an annual turnover of less than USD 1 million. Incubation activity is also one of the main activities of a quarter of the parks, which is why 84% of the parks examined have incubators between 1 and 5, and 44% have start-up companies under 10 years under 3 years old in their ecosystem. In addition to these activities, 2% of science and technology parks are in contact with more than 101 companies with domestic jurisdiction and 3% are the venues for more than 101 international contacts.

Regarding the proportion of the population of incubators, it can be stated that the city with the smallest population has the most incubators, the opposite of this ratio can be observed when comparing sales turnover and population, as a park settled in a city with a larger population generates more turnover. The reason for this relationship may be that operating costs in a smaller city may be lower, so settling there is more popular, but a large city may have infrastructural endowments that have a positive effect on sales turnover in the long run. There is no specific pattern in the proportion of employees and start-ups per population, so there is no significant correlation between them.

In addition to the number of employees, the relationship with international indicators was also analysed, based on which it can be stated that a significant part of the participating parks has less than 5000 employees, and internationality is even less important for them, as they have established international cooperation of less than 125.

In summary, the six factors examined illustrate the social activity of science and technology parks well, and based on a deeper examination of these, the operational differences and characteristics of each park can be clearly seen. It can therefore be confirmed that science and technology parks influence economic and social development, as they participate in incubation and start-up formation activities, and through their international networking, they want to involve further global companies in their network of contacts, thus strengthening the region's visibility and its economic strength. The dot charts show that for the attributes studied, parks are clustered in area where both indicators are low, so that in most cases significant social impact can be identified, with a few benchmarks' parks in the most significant social impact quarter.

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N/A

Peer-review

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Author Contributions

Conceptualization: A.Cs., Cs.T.; Investigation: A.H.; Material and Methodology: Cs.T. Supervision: A.H., Visualization: A.Cs.; Writing-Original Draft: A.Cs., D.A.; Writing-review & Editing: A.Cs., S.Ö.; Other: All authors have read and agreed to the published version of manuscript.

Conflict of Interest

The authors have no conflicts of interest to declare.

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A Comparative Study of Project Success Factors and Success Criteria in a Company From the Perspective of Project Leaders and Managers

JÁNOS BALOGH¹

Abstract: Project success can be interpreted differently by different actors, roles and stakeholders, based on their goals, interests and expectations. The present comparative study covered members of the senior management, hereinafter referred to as managers and project leaders of a pharmaceutical development and manufacturing company in the large corporate sector in Hungary. The aim of the study is to explore comparatively the perception of project success factors and success criteria from the perspective of project leaders and managers. To assess the perception of success factors and success criteria by managers and project leaders, a questionnaire survey was used as a quantitative research method. The questionnaire survey investigated what success factors managers and project leaders consider important for the success of projects and what success criteria they use to judge the success of projects. The study focuses on the differences and similarities in the perceptions of the stakeholders studied. The study may contribute to a certain understanding of project management practices in the pharmaceutical industry based on the similarities and differences in perceptions between the stakeholders studied and may help to facilitate collaboration and alignment of expectations between stakeholders.

Keywords: pharmaceutical industry; project management; project success; success factors; success criteria, manager, project leader

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1. INTRODUCTION

The secondary research included the identification of project success factors and project success criteria defined in the domestic and international literature, and then, within the framework of primary research, the determination of their importance within a given company. In the view of recognized researchers in the field of project management, the understanding of project success today goes beyond the traditional project triangle of time, cost and quality/objective expectations, and requires a more complex, multi-element approach. In this comparative study, it was assumed that, in addition to the basic elements of the classic project triangle, other success factors and success criteria would also play a somewhat important role in the assessment of the managers and project leaders.

2. MATERIAL AND METHOD

Following the literature review, questionnaire-based primary research was conducted which success factors and success criteria were considered important by the managers and project leaders (study population) of the given company according to their experience.

The research methodology (questionnaire) is based on the books by Malhotra (2017) and Gyulavári et al. (2017).

The success factors and success criteria listed in the questionnaire are external data from secondary research, publications, articles, studies, validated questionnaires, no pilot surveys were needed. Among the literature sources processed, a relatively small number of research and publications with a specific pharmaceutical focus were presented. Therefore, the success factors and success criteria used in the questionnaire were based on a combination of general literature sources from several industries and a limited number of pharmaceutical industry-specific studies.

The success factors of the project under review were grouped into logically and substantively coherent clusters based on the study by Tsiga et al (2017). The success criteria of the project under review were sorted into logically and content-wise coherent groups based on the research of Horváth (2018).

The questionnaire was designed to enable managers and project leaders to rate anonymously, based on their own opinion, the success factors and success criteria listed in the questionnaire on a scale of 1 to 4, with 1 being the least important and 4 being very important. The scale categories were determined based on research by Bostock Marketing Group (2014) so that there were no neutral response options. Respondents were given a choice of two positive and two negative response options (forced choice). The questionnaire subjects were asked to choose which success factor/success criterion was most important to them in their work.

The questionnaire was a one-answer closed-ended questionnaire. The questionnaire also included free spaces to allow the respondents to specify some additional factors/criteria if they did not see them listed but were important to them.

The research sought to answer the following questions:

- is there a similarity or difference between the success factors considered important and most important by managers and project leaders?
- is there a similarity or difference between the success criteria that managers and project leaders consider important and most important?
- do the success factors and success criteria considered important and most important by both managers and project leaders differ from the elements of the classic project triangle?

3. RESULTS

More than 90% of the managers and project leaders surveyed were willing to complete the questionnaire, making it a representative survey. The evaluation was carried out according to the recommendations of Malhotra (2017) and using Microsoft Excel software, separately examining the success factors and success criteria for each group separately.

3.1. Success factors

In the success factors section of the questionnaire, managers and project leaders who completed the questionnaires were asked to rate which factors they felt and experienced contributed more or less to the success of projects.

The first set of success factors were the external and internal challenges. In this group, respondents could rate the environmental factors surrounding the company and its employees. Both project leaders and managers gave high scores to the working environment. The scores of both stakeholder groups represents the company's strong HSE (health, safety, environment and health and safety) policy and principles. For project leaders, the working environment can have a direct influence on the efficiency of the project team, safety at work and a higher chance of achieving project objectives. Managers are strategically linked to the company's operations, so the working environment may have less impact on their day-to-day activities, but they often make system-level decisions on how to maintain and improve the working environment. For project leaders, the technological environment is another important factor, i.e. the level of equipment, the physical facilities, the number of specialists, the existence of R&D, the infrastructure, the technical and technological level, the IT infrastructure. While in most cases managers monitor and assess elements of the technological environment at a strategic level, for example when making investment and development decisions, project leaders and their project teams can directly perceive the impact of the technological environment in their day-to-day work. A properly built and functioning IT infrastructure, or modern and well-equipped R&D facilities, or well-trained and available professionals can increase the efficiency of project managers and project teams.

The next group of factors is the knowledge and experience group. The factors in this group received high scores from both stakeholder groups, so both knowledge management and realistic and achievable plans are important factors. The latter is so important to managers that it was rated as a critical success factor. For managers, if a factor is critical, it can have a significant impact on the whole organization, the strategic goals of the organization, the long-term survival of the business and its competitiveness. It is therefore worth paying more attention to this factor throughout the project life cycle, because implement this factor into the project can ensure a higher likelihood of success. Project leaders execute the project at operational level with the project team, based on the project plans. Realistic and well-founded project plans have strategic importance for managers, as they are the ones who make high-level decisions, prioritize, allocate organizational resources, evaluate project results, and take responsibility and risk for the performance of the whole organization and projects.

Within the support of the senior management group, the most important factors for both project leaders and managers are the support of the project by Management and the commitment of Management to the project. Management's commitment to the project, and their consistent and coherent support for the project, will help the designated project leader and the project team he/she manages to operate effectively, and thus increase the likelihood of successful project delivery.

For managers, it is more important that decision-makers consider the cost requirements of the project than for project leaders. Proper management of cost demands during project execution can have significant importance for the successful and sustainable implementation of a project. While cost implications directly affect the day-to-day work of project leaders and the project team and the progress of the project, they have greater importance to managers at strategic and organizational level, particularly in terms of decision-making, resource allocation and ensuring financial stability.

The next group of factors is the group of institutionalized factors. The factors in this group were scored as more important to project leaders. While managers focus primarily on achieving strategic goals and allocating resources efficiently, for project leaders, the consistent application of defined and controlled processes and quality standards are among the basic requirements for day-to-day operations and work organization.

The project manager competence group is the next group of factors assessed. Among the factors in this group, managers gave high scores to several factors, but none of the factors received a maximum score based on their ratings. However, project leaders gave maximum scores to several factors. For them, the project manager's team organization and team leadership skills, planning and organization skills, conflict management skills, and ability to inspire and motivate were also critical. These factors can have a direct and immediate impact on the overall project life cycle, the operational functioning of the project leader and project team, their performance and the achievement of project objectives. The combination of these factors can enable project leaders not only to coordinate project work, but also to manage the project and the project team as a true leader (providing direction, credibility, motivation, involvement, conflict management), to manage difficulties during the different stages of the project life cycle and to facilitate the successful execution of the project. The paramount importance of these factors points to the fact that the human 'soft' effects of project leaders can also make a greater contribution to project success.

Among the factors that belong to the group of project-based organization, stakeholder commitment and a defined time and schedule plan are important for both managers and project leaders. Stakeholder commitment is important for both stakeholder groups, because acceptance and support for projects can contribute to a smoother and more efficient project implementation. And a defined time and schedule plan can help the project leader and project team to work together and can help managers to achieve strategic objectives on time. Project leaders also scored highly on the defined scope and budget plan, which are part of the operational implementation framework of the project. According to the scores given, the existence and subsequent continued presence of a project team and a defined resource plan are critical success factors for the project leaders who completed the questionnaire. Project leaders work directly with the project team as a human resource on the day-to-day execution of the project. And a well-defined, well-scoped project can provide clarity on the tasks to be performed. An existing project team and appropriate project scoping can make the work smoother. Managers ensure resources are allocated and re-allocated according to the needs and deliverables of the project portfolio.

For the contractual and partner aspects, managers generally gave lower scores than project leaders. Project leaders gave higher scores to the commitment of internal departments and the partners, the latter being considered critical by project leaders. Project leaders, as representatives of projects, interact directly with internal departments and partners. As external stakeholders, partners (suppliers, service providers, partner companies in charge of specific phases of development and production, joint ventures) are more difficult to be involved and win over and project leaders have lesser impact on them, and therefore more efforts are required from project leaders to gain the commitment and support of partners. Partners require more attention, and their lack of commitment can lead to project failure. Managers also need the commitment of the different stakeholders, but they support partnerships at a strategic level with other assets and through other means.

Among the elements of the project team competence factor group, project team's commitment is equally important for both managers and project leaders. For project leaders, the commitment of the project team can contribute to the day-to-day execution of project tasks and to the efficiency of work. For managers, the commitment of the project team can predict a more successful completion of projects. Project leaders scored higher on communication within the project team. Good communication ensures proper distribution and flow of information, timely identification of risks and problems for the project leader and the project team. Although managers are also concerned about the overall progress of the project, their position does not require them to delve deeper into the details of operational communication within the team. It is worth mentioning that a committed project manager and a collaborative project team are considered critical success factors by project leaders. These two factors can mean a solid foundation for project success for project leaders, as there can be less conflict, more efficient project execution and more effective resolution and removal of problems and obstacles that arise.

Within the project risk management factor group, it is worth highlighting that the active and flexible risk management factor was given higher scores by managers. The scores indicate that managers place more emphasis on risk management than project leaders. This may be due to different risk perceptions. It is important to align risk management expectations and practices at levels of project leaders and manager, as appropriate and timely escalation and delegation may be missed, the project organization may lose flexibility and its ability to anticipate may be weakened. A solution could be to suggest assertive communication, understanding and integration of needs and expectations between different levels, including through mentoring.

The next and last group of factors to be assessed is the requirements management group. In this group, both managers and project leaders who completed the questionnaire gave the highest possible score to the defined project objective, with both stakeholder groups rating it as a critical success factor. At operational, project execution level, a well-defined project objective can provide direction and focus. At the senior management level, a well-defined project objective can provide alignment with corporate strategy and the opportunity to create targeted value. Planning and executing projects without a goal/objective at all levels can lead to premature project failure.

When a success factor has high priority and attention at both strategic and operational levels, it can act as a link between different levels of decision-making and execution allowing projects to enjoy stronger support and develop closer

cooperation and commitment through shared interests and less resistance and conflict, thus significantly increasing the chances of project success.

3.2. Success criteria

As regards the success criteria, the managers and project leaders who completed the questionnaires were asked to rate the criteria listed in the questionnaire according to their preference for the criteria when evaluating the projects implemented.

The first set of success criteria is the set of business criteria. Within this group, business, economic profit was identified as an important criterion for both stakeholder groups. Business and economic benefits were rated as critically important criteria by the project leaders, so the failure to meet this criterion could render the project unworthy of evaluation by the project leaders. The performance of the project leader is often also measured in terms of whether the project has been able to keep within the budget allocated to the project and the economic results achieved by the project executed by him/her and the project team. For project leaders, business and economic benefits can be more important because this criterion can be one of the most directly measurable indicators and measures of their work. Managers tend to focus on the strategic importance of the project, its long-term impact and its contribution to corporate objectives when evaluating projects. A project can be loss-making in the short term if it opens new markets or leads to other important results. Within the group, both profit growth and value creation as success criteria were highly rated by project leaders. The same criteria were rated less important by managers. The profit generated by the successful execution, implementation of projects is an important driving force for projects, which can make a major contribution to the survival and further development of the company. Basically, it is not a problem if value creation and profit growth as evaluation criteria are not as important for managers as for project leaders. This may be a concern if there is no properly communicated and applied evaluation system at the appropriate levels. It may also be the case that the priorities are not the same for the two stakeholder groups, as the aim is not to have all stakeholders assess the criteria in the same way. If necessary, as a risk mitigation, the establishment and conscious operation of an evaluation system agreed at the relevant levels could improve the current situation by providing appropriate indicators of cost-effectiveness, return on investment and value creation potential.

In the primary project criteria group, project leaders gave higher scores than managers for adherence to time and schedule, and quality plans when evaluating projects. It would appear from the above that for project leaders, meeting the elements of the iron triangle (time, cost, quality) is a key success criterion when evaluating projects. This is understandable, as project leaders are directly responsible for projects and are operationally accountable for the entire project life cycle. These criteria are the project leaders' direct indicators of success or failure. Managers tend to assess the fit of the project with the strategy, its long-term results and impacts.

During the evaluation of the criteria belonging to the group of project ownership and organizational criteria, both project leaders and managers evaluated the project manager's skills, abilities and competences as important criteria. Project leaders consider this criterion as critical, as well as the criterion of meeting the objective. The scores indicate that for managers, the project leader is a key role whose day-to-day performance is monitored and evaluated. For project leaders, a project is handled as more than just a task to be completed. When the project is completed, it can be seen as feedback on their project management skills (communication, risk and conflict management, motivation, decision-making and decision support). If the completed project achieves its objectives, it can serve as evidence of the project leader's professionalism and competence as a project leader. The fulfilment of these criteria can also act as a motivating factor for project leaders when executing further projects.

In the last group of criteria, the stakeholder criteria, the project leaders who completed the questionnaire gave higher scores to the reliability and sustainability of the product/process delivered by the executed, implemented project, as well as to the satisfaction of the partner, client and stakeholders. If the stability and long-term sustainability of the product or process delivered by a project executed, implemented by the project leader and the project team is questioned by stakeholders, the direct consequences of this should be borne by the project leader and the project team in the first line, and the future trust in the project leader and the success of future projects may depend on these criteria. Project leaders are in direct contact with clients and partners and can directly experience their dissatisfaction and it is up to the project leader to implement the feedback and change requests into daily project practice in order as development opportunities.

4. DISCUSSION AND CONCLUSIONS

In the assessment of success factors by project leaders and managers, several success factors can be found that both project leaders and managers rated as equally important based on their respective scores, i.e. their perceptions were the same. Observation done that, in general, during the completion of the questionnaire, the two stakeholder groups considered those success factors as important factors that their level and their work represents and required. It is noticeable that several success factors that are not elements of the classical project triangle received high and maximum scores from both stakeholder groups, several of them being human aspect 'soft' factors. Based on the assessment of project leaders, 10 factors were identified as critical success factors, while managers highlighted 2 factors as critical. It is worth mentioning that one of the critical success factors - namely the defined project objective - was identified as critical by both groups of

evaluators. Implementation of this critical success factor into corporate project practice can increase the success of projects more significantly than the perceived impact of other success factors. The risk perception diversity between managers and project leaders is a challenging area for improvement, which can have an impact not only on the success and effectiveness of projects, but also on organizational collaboration, resilience and pro- and reactivity.

The evaluation of the success criteria revealed that project leaders considered more success criteria to be more important in terms of their scores than managers. Project leaders assess the success of projects according to more criteria, and they want to tend to meet more expectations. Managers may prefer to increase the likelihood of project success through more complex project input system. 3 criteria were evaluated as so-called (like the name of the Critical Success Criteria) as Critical Success Criteria (CSC) by project leaders, while no critical success criteria have been identified by managers. Among CSC defined by project leaders includes a human aspect, 'soft' criterion, which is not part of the classical project triangle (project manager's skills, abilities and competences). It is worthwhile to identify and analyze the causes of the possible business priority gap between the two groups of stakeholders (even in workshops) and to bridge or reduce it (even through trainings) in order to increase the efficiency of project practice.

It can be seen from the results of the questionnaire survey that the evaluation criteria for project success depend on the role of the evaluator. While project leaders typically focused on the operational elements, managers often prioritized the alignment of the project with strategic objectives and the realization of higher level and longer-term benefits. Consensus between different levels on a particular success factor or success criterion can lead to coherence and effectiveness, so it is worth exploiting the potential to strengthen project culture, practice and awareness. If the respective stakeholder groups have different views on the importance of a particular success factor or success criterion, the divergence can generate constructive and forward-looking dialogue, and can even lead to a review and positive, concerted, one-way change in previous thinking and practice.

Conflict of Interest

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Rethinking Temporary Housing: Adaptability and Resilience within Human-Centered Architecture

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Abstract: Seasonal agricultural workers, a critical yet vulnerable component of rural economies, often reside in temporary settlements marked by housing insecurity, poor infrastructure, and limited social integration. This study reimagines these settlements—located within urban-rural interface zones—through a human-centered architectural lens that emphasizes adaptability and resilience. Framed within the theory of social-ecological systems (Folke, 2002; 2006), these temporary living environments are understood as dynamic boundary zones requiring multi-dimensional and participatory approaches to resilience-building. The research methodology follows a four-stage process: field interviews with workers and local authorities; spatial and functional scaling of settlements; thematic coding aligned with resilience dimensions; and frequency analysis to identify key vulnerabilities. The study adapts five urban resilience dimensions—physical, social, economic, institutional, and environmental (Kim & Lim, 2016; Spaans & Waterhout, 2017)—to the specific context of seasonal labor housing in Türkiye. Findings indicate that adaptable spatial design, participatory planning, and ecological responsiveness are vital to the sustainability of both temporary housing systems and their surrounding communities. Additionally, strengthening social ties between seasonal workers and local villagers is identified as essential for fostering long-term social resilience. Fieldwork conducted in seasonal worker settlements in Bursa provides contextual insight and supports the framework's relevance to local governance. By integrating the principles of human dignity, sustainability, and contextual design, the study offers a conceptual and practical framework for future housing policies. Ultimately, it contributes to a deeper understanding of how adaptable design and governance can enhance resilience in temporary rural settlements.

Keywords: seasonal agricultural workers, temporary housing, social-ecological resilience, adaptability

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1. INTRODUCTION

Temporary rural settlements, especially those for seasonal agricultural workers (SAWs), represent vulnerable spaces within the social-ecological system. Seasonal agricultural workers have an important role in agricultural economies, but they have been facing many problems, not only about their social rights but also their living environments. Inadequate infrastructure, unhealthy housing units, and social exclusion are some of them. Thus, temporary rural settlements, such as SAW housing environments, need to be studied in terms of resilience with a holistic approach that integrates physical, social, economic, institutional, and environmental dimensions.

Studies in the literature show that resilience-based approaches improve both the physical stability of the settlements and the social cohesion of the rural communities and the SAWs within a long-term sustainability perspective (Wilson, 201; Tambo and Wünscher, 2017). Folke (2006), conceptualized social-ecological resilience as a system's ability to absorb disturbances while maintaining its core functions and adapting to changing conditions. In light of this description, we can propose that in the case of rural temporary settlements, we should understand resilience in terms of adaptability. The ways seasonal agricultural workers withstand external pressures such as seasonal migration, climatic changes, and differing labour demands.

The aim of this study is to explore complex problems of SAWs' housing conditions by adopting multi-dimensional urban resilience frameworks of Kim & Lim, 2016, and Spaans & Waterhout, 2017, to a rural context. The study especially examines the structural and spatial conditions of the shelters, the integration of SAWs into local economies, governance strategies for SAWs settlement planning, and ecological sustainability issues. The analysis and thematic coding of the observations made in the case study areas helped to identify the main vulnerabilities and develop resilience-oriented strategies to improve SAWs' housing conditions in the rural environment.

The outcomes of the fieldwork led to the provision of a framework, especially for local authorities, policymakers, and researchers, to increase the adaptability of the temporary rural settlements that contribute to long-term socio-economic and ecological sustainability objectives. The study enhances the discourse on rural sustainability by linking theoretical frameworks to grounded, context-specific practices.

2. MATERIAL AND METHOD

The methodology of this study includes two main stages. At the first stage, a literature review has been made to develop a theoretical framework about “resilience in social-ecological systems. “At the second stage, qualitative field analysis, having a four-stage process, has been undertaken. The research approach combined the outcomes of these two main stages to generate a context-specific insights into the resilience of temporary rural settlements with a focus on SAWs’ living environments. Yenişehir and Mustafakemalpaşa are the study areas which were selected because of their high density of seasonal agricultural workers’ camps and their representative socio-ecological characteristics.

2.1. Literature Review

Social-ecological resilience refers to the capacity of a system shaped by the dynamic interaction between human communities (social systems) and the rural environment (ecological systems) to withstand external stresses, adapt to changing conditions, and reorganize while maintaining its core functions and identity (Adger, 2000). When examined individually, the components of the concept can be summarized as follows;

Folke (2002, 2006) defines resilience as a system’s ability to absorb disturbances while conserving its basic structure and functions within social-ecological frameworks. He puts stress on that in these frameworks, resilience is an integrated concept including social interactions, governance mechanisms, and ecological adaptability. The concept emphasizes adaptive capacities enabling long-term sustainability, highlighting the interdependencies between human communities and their ecological surroundings.

Temporary rural settlements often function as boundary zones within social-ecological systems (Adger, 2000; Folke, 2006), where various vulnerabilities, including social, economic, and environmental factors, interact (IPCC,2022). Examining the resilience of such settlements requires the use of a multi-dimensional vulnerability assessment framework, because their resilience depends on their ability to reorganize against different kinds of external and internal pressures and sustain their basic livelihood functions. A multi-dimensional vulnerability assessment framework will help to identify strategies for improving settlements’ adaptability.

Folke (2006) defines adaptive capacity as a system’s ability to modify its organization and functions in response to external pressures. Temporary rural settlements are characterized by a range of structural instabilities. Workers migrate in and out seasonally, infrastructure remains largely provisional, and governance mechanisms often lack long-term strategic frameworks. Because of these kinds of problems, adaptation is essential for them.

On the other hand, temporary rural settlements act as transition spaces between urban and rural landscapes, which gives them a dual character. Wilson (2010) defines this dual character as being evident in spatial fluidity, economic interactions, and evolving relationships between migrant workers and local residents. These hybrid characteristics of temporary rural settlements reflect their spatial and institutional complexity, which in turn necessitates adaptive capacity strategies, including community-based resource management and participatory governance mechanisms.

2.2. Qualitative Field Analysis

The empirical study, including four stages, can be summarized as follows;

- i. Semi-structured interviews with seasonal agricultural workers, representatives of local institutions, and other local actors. The experiences of the actors, governance challenges, and SAW’s perceptions of the housing conditions. Each of the five resilience dimensions was included in the questions.
- ii. Spatial and functional analysis via field observations that were undertaken in different harvest seasons. Housing types, accessibility to utilities and sanitation, and organization of the public spaces were documented. This documentation allows researchers to assess the spatial patterns and infrastructural vulnerabilities.
- iii. Thematic coding of the field data using inductive analysis. Some issues, such as inadequate shelter, water scarcity, and social isolation, were repeated so many times by the interviewees. Researchers identified these issues and mapped them onto the resilience dimensions to achieve a coherent analytical framework.
- iv. Frequency and pattern recognition analysis relied on repeated field visits and observational coherence to determine the most important problems of the SAWs. Findings were integrated with established theoretical perspectives to ensure analytical soundness.

This four-stage methodology clarified the key vulnerabilities of temporary rural settlements and contributed to the development of a resilience framework validated by both theoretical and empirical foundations.

3. RESULTS

The analysis of seasonal worker settlements in Yenişehir and Mustafakemalpaşa revealed multiple layers of vulnerability across physical, social, economic, institutional, and environmental dimensions of resilience. Data obtained through field observations and interviews identified recurring shortcomings in governance frameworks, economic stability, social

cohesion, infrastructure, and environmental risk management. The results are systematized according to the dimensions of resiliency and summarized as follows:

Physical Resilience: The housing units of the seasonal agricultural workers were mostly tents, which were made of non-durable textile materials. Some of them were poorly insulated prefabricated units. None of them had fire and thermal safety, which led to inadequate living conditions (figure 1). Limited access to clean water contributed to hygiene issues and the spread of diseases. These issues reinforce the critical role of sufficient infrastructure in settlement resilience, as Kim and Lim (2016) stated. Incorporating off-grid energy solutions, access to clean water, and sanitary facilities into settlement design should be addressed as a priority to enhance the living standards of SAWs. On the other hand, when housing units are considered, modular and adaptable units that have flexible layouts should be built with climate-adaptive and fire-resistant materials to provide safe and secure living conditions for SAWs and their families.



Figure 1. Some views from seasonal agricultural workers' temporary tents

Social Resilience: Local residents do not want to interact with seasonal agricultural workers because of ethnic and cultural differences. Either different groups of SAWs having different ethnic backgrounds do not have any social integration. In Yenişehir and Mustafakemalpaşa SAW settlements, there are nearly no communal spaces. This absence of shared communal spaces and deficiencies of cooperative systems in agricultural activities have further weakened social ties. There is a mutual distrust and limited interaction between local residents and seasonal workers that causes social exclusion. These findings align with Folke's (2006) concept of social-ecological interdependence. Spatial planning strategies of the settlements are crucial to provide social resilience. Implementing a participatory design strategy, involving both SAWs and locals, is necessary to ensure inclusive outcomes. Market areas, communal kitchens, and common spaces that have flexible plan schemes for cultural exchange are key elements of settlement areas and their organization.

Economic Resilience: workers are uncomfortable with the fact that intermediaries decide how much they are paid and make various deductions from their wages. In addition, the costs of basic needs like water and electricity in the settlements are also taken from their daily earnings. These deductions, along with the intermediary's commission, further reduce their already low incomes. In addition, there are workers employed informally, which constitutes a major issue. Priority should be given to implementing measures that eliminate informal employment. Furthermore, integrating SAWs into local value chains through inclusive cooperatives may improve access to tools, markets, and savings mechanisms. Multipurpose buildings in the settlements that serve as both workspaces and storage facilities can further support economic resilience.

Institutional Resilience: Settlement sites were always selected informally by the intermediary person on behalf of the SAWs. Neither state officials nor municipal authorities have the authority to designate settlement locations; there is a serious overlap of responsibilities, a lack of oversight, and significant gaps in governance. Along with these deficiencies, the lack of formal planning and service provision reflects weak institutional resilience. In order to strengthen institutional resilience, formal recognition of seasonal settlements in municipal planning is of utmost priority. Participatory decision-making mechanisms involving SAWs represent another critical priority. Provision of safe land allocation, regular waste collection, and regular health services should also be fully recognized for providing institutional resilience.

Ecological /Environmental Resilience: SAWs' settlements were frequently located near agricultural fields at risk of flooding and dust exposure. There was no evidence of climate adaptation or resource management strategies. Enhancing ecological resilience in these settlements requires not only the implementation of nature-based solutions such as rainwater harvesting, shaded public spaces, vegetative buffers, but also specific measures to solve unique problems of each settlement site. Particularly, elevated platforms and basic drainage systems for reducing flood risks, surface grading for preventing water stagnation, use of mosquito nets, natural repellents, and vector control practices for decreasing pest-related health risks can be proposed. If these strategies are applied together, more adaptive and environmentally resilient settlement planning may be possible for SAWs' housing areas.

4. DISCUSSION AND CONCLUSIONS

This study examined the resilience of seasonal agricultural workers' settlements in Bursa, within the context of temporary rural housing. The Social-ecological systems framework which emphasizes the physical, social, economic, institutional

and environmental domains of resilience, is used throughout the study. The findings emphasize the urgent need for integrated, adaptable, and human-centered approaches to the planning, design and governance of temporary housing of SAWs. The findings obtained from fieldwork conducted in Bursa, when generalized and evaluated within the context of resilience frameworks, provide valuable insights that can guide both theoretical discourse and practical implementations.

The priority of design strategies and political approaches should be human-centered, inclusive spatial planning, climate-responsive and modular housing systems, and governance structures supporting participation and accountability. Facilitating a participatory design approach for developing healthy and safe living environments – both in private housing units and public communal spaces- can enhance physical and social resilience. On the other hand, exploring and applying local economic models may contribute to economic resilience, while seeking nature-based physical and spatial solutions can enable the development of strategies for environmental adaptation.

As climate change and economic instability presents ongoing global challenges, design approaches grounded in resilience should not be seen only as responses to temporary needs. Rather, such approaches serve as a foundation for building sustainable rural futures. Studying on temporary housing issues with a human-centered approach have a transformative potential for both seasonal agricultural workers and host communities. This study contributes to emerging discussions on rethinking temporary settlements with forward-looking strategies that center human health and well-being together with socio-ecological adaptability.

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Ethics Committee Approval

This study was approved by the Bursa Uludag University Ethics Committee for Research and Publication in Science and Engineering.

Peer-review

Externally peer-reviewed.

Author Contributions

All authors contributed to the study conception and design. Material preparation, data collection and analysis were performed by Arzu Çahantimur, Rengin Beceren Öztürk and İrem Tunçbiz Özgür. The first draft of the manuscript was written by Arzu Çahantimur and all authors commented on previous versions of the manuscript. All authors read and approved the final manuscript. All authors have read and agreed to the published version of manuscript.

Conflict of Interest

The authors have no conflicts of interest to declare.

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Evaluation of Sustainable Competitiveness Performance in Economic Cooperation Organization Member Countries Using Integrated Entropy-MULTIMOORA Method

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Abstract: With the strengthening of globalization, countries have exceeded borders, and their economies have become mutually interdependent. In this new economic order, achieving a sustainable competitive advantage has become a strategic priority for countries. In this context, the aim of this study is to evaluate the sustainable competitiveness performance of the Economic Cooperation Organization (ECO) member countries. Within the scope of the study, the sustainable competitiveness performance of countries was evaluated by utilizing the Global Sustainable Competitiveness Index [GSCI (2024)] through Multi Criteria Decision Making (MCDM) methods. In the research, seven main criteria were applied: sustainable competitiveness, natural capital, resource intensity, social capital, intellectual capital, economic sustainability, and governance. First, these criteria were weighted using the Entropy method, subsequently, the countries were ranked by employing the MULTIMOORA (Multi-Objective Optimization on the basis of a Ratio Analysis plus the Full Multiplicative Form) method. According to the results of the Entropy method, the criterion with the highest importance was determined to be intellectual capital, while the criterion with the lowest importance was determined to be natural capital. According to the results of the analysis conducted using the MULTIMOORA method, the countries with the highest performance of sustainable competitiveness among ECO member states were Türkiye, Kazakhstan, and Kyrgyzstan, respectively, whereas the countries that ranked lowest performance were Afghanistan, Pakistan, and Tajikistan, respectively. Furthermore, when the results obtained in the scope of the study were compared with the GSCI (2024), it was determined that the country rankings were consistent with each other.

Keywords: Sustainable Competitiveness Performance, Economic Cooperation Organization, Entropy Method, MULTIMOORA Method

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1. INTRODUCTION

Globalization refers to the strengthening of mutual attachment and interaction between countries, societies, and economies (Kıvılcım, 2013). With the strengthening of globalization, countries have exceeded borders, and their economies have become mutually interdependent. In this new economic order, the process of strengthening the competitive advantages of countries has become increasingly complex and challenging (Karaaslan and Tuncer, 2010). This situation has led countries to engage in intense competition to secure a larger share of the market. In the global order where competition is intense, the success level of countries largely depends on their sustainable competitiveness (Yorgancılar, 2011).

Sustainable competitiveness can be expressed as a multidimensional concept that includes factors such as the protection of natural capital, the enhancement of social welfare, the development of intellectual capital, and the strengthening of institutional governance capacity, in addition to economic performance (Yıldız and Genç, 2020). According to SolAbility (2024), “*sustainable competitiveness is the ability to generate and sustain inclusive wealth without diminishing the future capability of sustaining or increasing current wealth levels*”. The sustainable competitiveness approach has expanded the boundaries of the classical understanding of competition by making elements such as the efficient use of resources, the enhancement of social welfare, and the protection of natural capital an important part of competitive advantage (SolAbility, 2024). In this context, aligning economic growth with social and environmental balances is of critical importance.

ECO is an important cooperation organization that aims to promote regional economic development. Covering a wide geography with its 10 member countries, the ECO aims to expand trade and development opportunities in the region from the Mediterranean to South Asia (Tatar, 2020). The aim of ECO’s establishment is to encourage regional cooperation and accelerate economic development by strengthening economic relations between the countries included in the organization (Doğan, 2011). It can be said that increasing the trade volume between countries and sustainable development goals is a critical issue for ECO member countries. The member countries of the ECO have different natural resources and strategic locations. This situation causes the trade volume and mutual attachment between the member countries to increase. By contributing to the strengthening of trade through regional cooperation, the regional competitive power is increased (Tatar, 2020; Doğan, 2011).

Nowadays, evaluating economic success only by short-term growth is insufficient. For countries, sustainability factors such as the extent to which they can protect their natural resources, how they structure their social welfare, and the effectiveness of their institutional functioning are important in terms of competitiveness (Berber et al., 2023). Global environmental problems, resource shortages, and social inequalities show that measuring competitiveness only with economic data is inadequate (Gedik, 2020). Therefore, in order to accurately analyze the competitiveness levels of countries, a multidimensional evaluation that includes social, environmental, and economic dimensions should be conducted. The GSCI (2024) adopts a multidimensional sustainability perspective, evaluating not only the economic growth performance of countries but also their capacity to sustain this growth through a comprehensive approach that includes environmental, social, and governance components. This index helps analyze the long-term competitiveness potential of countries from a more strategic perspective by considering the key components of sustainable competitiveness. The GSCI (2024) offers a comprehensive analysis by evaluating countries according to seven main criteria: *sustainable competitiveness*, *natural capital*, *resource intensity*, *social capital*, *intellectual capital*, *economic sustainability*, and *governance* (SolAbility, 2024).

MCDM, can be defined as a systematic set of methods that allow decision makers to determine the most appropriate alternative by taking into account multiple variables simultaneously. These methods help to rank alternatives by weighting and comparing criteria in order to better analyze the structure of decision-making problems (Taherdoost and Madanchian, 2023). The Entropy method, used for criterion weighting, enables the calculation of the value of criteria based on data and independent of the decision-maker's judgments (Chen et al., 2015). While the Entropy method produces objective weights by taking into account the differences among criteria (Podvezko et al., 2017), the MULTIMOORA method offers an integrated perspective in ranking alternatives through its triple evaluation approach, which includes ratio system, reference point approach, and full multiplicative form (Hafezalkotob et al., 2019).

When the relevant literature is examined, it is seen that there are various studies related to the sustainable competitiveness of countries (Máté et al., 2022; Štilić et al., 2023; Işık, 2023; Kara et al., 2024). It is considered that this study will contribute to the literature in terms of evaluating the sustainable competitiveness performances of the ECO member countries with the Entropy-based MULTIMOORA method based on GSCI (2024) data.

2. LITERATURE REVIEW

In the literature, some studies that have evaluated sustainable competitiveness performance using MCDM methods are summarized below.

Máté et al. (2022) employed MCDM methods to simultaneously evaluate the global competitiveness and sustainable competitiveness levels of countries. For this purpose, they combined data from the Global Competitiveness Index (GCI, 2019) and the GSCI (2019). The countries were ranked using the DRAPE (Deep Ranking Analysis by Power Eigenvectors) method, while the interrelations among the criteria were explored using the VARCLUS (Variable Clustering) method. The first cluster includes environmental factors such as natural capital and resource intensity; the second cluster includes social and institutional factors such as infrastructure, skill level, health, and governance; and the third cluster includes structural competitiveness indicators, including institutions, labor market, innovation capacity, and financial system. As a result of the VARCLUS clustering method, it was determined that innovation, institutional structure, and financial system are the main determinants of sustainable competitiveness. The final ranking showed that Switzerland has taken the top position, followed by Sweden and Finland, respectively. In contrast, Lesotho, Zimbabwe, and Mali were positioned at the bottom of the ranking, respectively.

Štilić et al. (2023) evaluated the sustainable competitiveness performance of the Balkan countries. In the study, the Entropy and MARCOS (Measurement Alternatives and Ranking according to the Compromise Solution) methods were used in an integrated manner, and data from the GSCI (2022) were used. Natural capital and resource efficiency and intensity were identified as the criteria with the highest level of importance, while the social cohesion criterion was found to be the criterion with the lowest level of importance. According to the analysis results, Greece and Albania were ranked first and second, respectively, while North Macedonia was ranked last.

Işık (2023) aimed to evaluate the sustainable competitiveness performance of the Organisation for Economic Co-operation and Development (OECD) countries in his study. Within the scope of the study, GSCI (2022) data were utilized. The Entropy and GRA (Grey Relational Analysis) methods were applied in an integrated manner. Criterion weights were determined using the Entropy method, and countries were ranked using the GRA method. It was found that the criteria with the highest level of importance were social capital and natural capital, respectively. The analysis results showed that Sweden, Iceland, and Switzerland were ranked in the top positions, respectively, while Mexico and Türkiye were ranked at the bottom, respectively.

Kara et al. (2024) aimed to compare Türkiye's sustainable competitiveness performance with that of its neighboring countries in their study. In the analysis, GSCI (2022) data were utilized. The MEREC (Method Based on the Removal

Effects of Criteria) method was used to determine the criterion weights, while the AROMAN (Alternative Ranking Order Method Accounting for Two-Step Normalization) method was employed for the ranking of countries. The analysis results revealed that the criterion with the highest level of importance was resource efficiency and intensity, while the criterion with the lowest level of importance was social capital. According to the ranking results, Greece and Bulgaria have taken the top positions respectively, and Türkiye was ranked third. At the bottom of the ranking were Iraq, Syria, and Iran, respectively.

In the literature, it is seen that Entropy and MULTIMOORA methods are used together or separately in various studies, some of which are summarized below.

Türe et al. (2016) utilized the MULTIMOORA method to evaluate the macroeconomic and political risk levels of countries. In the study, data from 76 countries for the year 2012 were used. The study, conducted by the researchers, employed 22 criteria, and the criterion weights were considered equal. According to the analysis results, the top three countries with the lowest risk levels were determined to be Luxembourg, Singapore, and Norway, respectively. Pakistan, Egypt, and Paraguay were identified as the countries with the highest risk levels, respectively.

Kılıç Depren and Bağdatlı Kalkan (2018) analyzed the Better Life Index data compiled by the OECD to evaluate the quality of life levels of 38 countries. In the study, 24 criteria were used, and the criterion weights were calculated using the Entropy method. The MULTIMOORA method was employed for ranking the countries. According to the weighting results, the criterion with the highest level of importance was household financial wealth, while the criterion with the lowest level of importance was dwellings with basic facilities. As a result of the analysis, the United States, Switzerland, and Belgium were identified as the countries with the highest quality of life, respectively, while South Africa, Türkiye, and Mexico were ranked at the bottom, respectively.

Akpınar and Metin (2023) employed MCDM methods to define the target market selection strategy of a company that produces and plans to export cold storage and pre-cooling systems to foreign markets. In the study, Romania, Georgia, and Kazakhstan were identified as alternative target markets in line with the export strategy of a company producing cold storage and pre-cooling systems. Criterion weights were calculated using the Entropy method, and the alternative countries were ranked using the MULTIMOORA method. According to the Entropy results, the criterion with the highest level of importance was investment risk, while the criterion with the lowest level of importance was product utilization rate. The analysis results showed that Georgia was identified as the most suitable target market, while Romania was ranked second, and Kazakhstan was ranked third.

Momena et al. (2024) used the CRITIC (Criteria Importance Through Intercriteria Correlation) and MULTIMOORA methods in an integrated manner to evaluate the operational and economic performance of supply chain companies operating in the e-commerce sector. In the study, five main criteria were identified: logistics challenges, demand and supply imbalances, technological and cybersecurity issues, sustainability and ethical sourcing, and supply chain disruptions. Criterion weights were calculated using the CRITIC method, and the companies were ranked using the MULTIMOORA method. According to the analysis results, the criterion with the highest level of importance was supply chain disruptions, while the criterion with the lowest level of importance was demand and supply imbalances. According to the ranking of alternatives, Company C and Company B have taken the top two positions, respectively, while Company D and Company A were in the last two positions, respectively.

Hezam et al. (2024) aimed to assess sustainable supply chain risks and select the best supplier through a case study of a gas company. For this purpose, the Entropy and CODAS (Combinative Distance-Based Assessment) methods were used in an integrated manner. The Entropy method was employed to determine the criteria weights, and the CODAS method was used to rank the suppliers. The analysis results indicated that supply risk was the criterion with the highest importance, while ethical risks had the lowest importance. According to the findings, Supplier 10 ranked first, followed by Supplier 5; the supplier with the lowest performance was Supplier 7. The results also revealed that Digital Twin technology is effective in sustainable supply chain risk management and that the Entropy-CODAS methods provide reliable results by reducing uncertainty.

Kaya (2024) aimed to evaluate the financial performance of companies operating in the accommodation sector of Borsa Istanbul (BIST) by analyzing the financial data from 2018 to 2022 in her study. In this context, CRITIC weighted MULTIMOORA and DEMATEL (The Decision Making Trial and Evaluation Laboratory) weighted TOPSIS (Technique for Order Performance by Similarity to Ideal Solution) methods were utilized. The CRITIC method was used to determine the criterion weights, while the DEMATEL method was employed for the analysis of the cause-and-effect relationships among the criteria. According to the CRITIC weighting results, the most important criterion in 2018 was return on equity, while in the years 2019-2022, the most important criterion was operating profit margin. The DEMATEL method, on the other hand, found that all criteria, except the leverage ratio, were equally important. According to the CRITIC-weighted MULTIMOORA ranking, TEKTU ranked first in 2018, 2019, 2021, and 2022, while ULAS was ranked first in 2020. According to the DEMATEL-weighted TOPSIS method, AVTUR was ranked first in 2018 and 2020, and TEKTU was again ranked first in 2019, 2021, and 2022.

Anjum et al. (2025), IFS (Intuitionistic Fuzzy Sets) and MCDM methods were used together to improve energy efficiency and support sustainable production in smart factories. In the study, eight criteria were determined, and the criterion weights were calculated using the Entropy method. CRADIS (Compromise Ranking of Alternatives from Distance to Ideal Solution) method was used in the ranking of the alternatives. According to the results of the Entropy method, the criterion with the highest importance was determined as energy consumption, and the criterion with the lowest importance was determined as employee health and safety. According to the ranking results, G5 and G4 alternatives were ranked first, respectively, and G1 alternative was ranked last.

Çanakçıoğlu and Özarı (2025) aimed to evaluate the financial performance of eleven energy companies listed on BIST in their study. In the study, criterion weights were determined using the Entropy method, and the ranking of the companies was performed using the TOPSIS and EDAS (Evaluation based on Distance from Average Solution) methods. According to the results of the Entropy weighting method, the criterion with the highest importance level was determined as receivable turnover, while the criterion with the lowest importance level was asset profitability. According to the results of the EDAS method, the SMRTG company ranked first, while in the TOPSIS method, the IZENR company ranked first. The SMRTG company ranked last in both methods.

3. MATERIAL AND METHOD

In this section, the methods to be used in line with the aim of the research are explained.

3.1. Entropy Method

The Entropy weighting method is used to obtain objective weights in decision-making problems, thereby determining the criterion weights in a data-driven manner, independent of the subjective judgments of decision-makers (Podvezko et al., 2017). Entropy, developed by Claude E. Shannon in 1948, is one of the fundamental elements of information theory and refers to the measurement of uncertainty or information content in a system (Bahadır and Türkmençalıkoğlu, 2021). As one of the MCDM techniques, the Entropy method ensures that the weights of each criterion are determined based on the amount of information contributed by the data, and thus, as the differences between alternatives increase, the information and importance carried by the criterion also increase (Shannon, 1948).

The Entropy method is implemented through the following steps (Shannon, 1948; Lotfi and Fallahnejad, 2010):

Step 1: Normalizing the Decision Matrix

$$r_{ij} = \frac{x_{ij}}{\sum_{i=1}^m x_{ij}} \quad (1)$$

Normalization is applied to eliminate anomalies with different measurement units and scales in raw data and make it comparable. The value r_{ij} in Equation (1) represents the normalized form of x_{ij} .

Step 2: Calculating the Entropy Values for each Criterion

$$e_j = -k \sum_{i=1}^m r_{ij} \ln(r_{ij}) \quad (2)$$

After the normalized decision matrix, the entropy value of each criterion is determined using the formula shown in Equation (2). Here, e_j represents the entropy value, and k denotes the entropy constant, which is calculated as $k = \frac{1}{\ln(m)}$.

Step 3: Calculation of the Degree of Information Diversification

$$d_j = 1 - e_j \quad (3)$$

The degree of information diversification is calculated using the formula shown in Equation (3) by utilizing the entropy value. The degree of information diversification is obtained by subtracting the entropy value from 1.

Step 4: Calculation of Criterion Weights

$$w_j = \frac{d_j}{\sum_{j=1}^n d_j} \quad (4)$$

Criterion weights are calculated based on the degrees of information diversification using the formula shown in Equation (4). As a result of this formula, the final weight coefficients of each criterion are obtained.

3.2. MULTIMOORA Method

The MOORA (Multi-Objective Optimization on the basis of Ratio Analysis) method, one of the MCDM methods, was first proposed in 2006 by Brauers and Zavadskas. The MOORA method aims to rank decision alternatives by making evaluations based on the ratio system (Brauers and Zavadskas, 2006). In addition to the ratio system and reference point approach, which are the core factors of the MOORA method, the inclusion of the full multiplicative form in the operation

has led to the development of the MULTIMOORA method, which is applied through the following procedural steps (Brauers and Zavadskas, 2006; Brauers and Zavadskas, 2010; Hafezalkotob et al., 2019):

Step 1: Creating of the Decision Matrix

The decision matrix is denoted as, $X=[x_{ij}]$. x_{ij} : represents the performance value of the i alternative in criterion j . The matrix consists of m alternatives and n criteria.

Step 2: Normalizing the Decision Matrix

$$x_{ij}^* = \frac{x_{ij}}{\sqrt{\sum_{j=1}^m x_{ij}^2}} \quad (5)$$

In order to make different criteria comparable, the decision matrix is normalized. In the formula shown in Equation (5), x_{ij}^* , represents the normalized value for the i -th alternative and the j -th criterion, and x_{ij} represents the original criterion value. As a result of the normalization process, all criterion values become dimensionless and are transformed into the $[0, 1]$ range.

Step 3: Ratio System

$$y_j^* = \sum_{i=1}^g x_{ij}^* - \sum_{i=g+1}^n x_{ij}^* \quad (6)$$

The ratio system is applied using the normalized decision matrix. While addition is performed for the criteria to be maximized, subtraction is performed for the criteria to be minimized. In the formula shown in Equation (6), y_j^* , represents the overall objective score of alternative j for all criteria. Furthermore, in Equation (6), g represents the number of beneficial criteria, while $n - g$ represents the number of non-beneficial criteria.

Step 4: Reference Point Approach

$$\text{Min}_{(j)} (\text{Max}_i |r_i - x_{ij}^*|) \quad (7)$$

The reference point approach begins with the normalized criteria expressed by Equation (5). The distances of the alternatives to reference points are calculated as shown in the formula in Equation (7). Here, r_i , i is the best value for the i -th criterion.

Step 5: Full Multiplicative Form

$$U_i = \frac{\prod_{j=1}^g x_{ij}^*}{\prod_{j=g+1}^n x_{ij}^*} \quad (8)$$

The general utility value is calculated by multiplying the values of the alternatives in all criteria as in Equation (8). As a result of this process, the general utility value of each alternative is made dimensionless and becomes comparable.

Step 6: Final Ranking

The results of MOORA-Ratio, Reference Point, and Full Multiplicative Form are combined and a dominance ranking is performed. The most dominance alternative is the one that has the highest ranking in all methods.

4. RESULTS

In the study, a decision matrix consisting of seven criteria and ten countries was prepared in the first stage. All criteria were defined as benefit-oriented. Criterion weights were calculated using the Entropy method, and the countries were ranked in terms of sustainable competitiveness performance using the MULTIMOORA method.

4.1. Application of the Entropy Method

As the first step in the Entropy method, a decision matrix was created. The decision matrix, which was formed using the data obtained from the GSCI (2024) report, is shown in Table 1.

Table 1. Decision Matrix

	Sustainable Competitiveness	Natural Capital	Resource Intensity	Social Capital	Intellectual Capital	Economic Sustainability	Governance
Türkiye	46,8	42,3	42,7	35,5	62,0	46,2	52,4
Kazakhstan	44,4	36,8	38,4	48,1	43,5	43,9	55,9
Kyrgyzstan	41,2	41,8	38,5	50,2	36,0	38,5	42,3
Uzbekistan	40,3	34,1	32,1	45,2	41,3	38,0	51,0
Tajikistan	35,8	36,3	40,5	34,3	31,0	34,0	38,4
Azerbaijan	38,6	39,2	33,1	43,8	39,0	37,6	38,9

Turkmenistan	36,7	32,2	35,4	36,2	36,0	39,9	40,2
Iran	36,2	29,6	30,9	36,6	49,3	33,7	37,4
Pakistan	34,4	35,2	37,9	33,2	26,3	38,0	35,5
Afghanistan	31,7	38,2	47,2	27,2	20,2	28,9	28,4

The process steps of the Entropy method are presented in the Appendix, and the obtained e_j , d_j , and w_j values are provided in Table 2.

Table 2. e_j , d_j and w_j Values

	Sustainable Competitiveness	Natural Capital	Resource Intensity	Social Capital	Intellectual Capital	Economic Sustainability	Governance
e_j	0,9972	0,9976	0,9965	0,9930	0,9817	0,9966	0,9920
d_j	0,0028	0,0024	0,0035	0,0070	0,0183	0,0034	0,0080
w_j	0,0618	0,0524	0,0764	0,1543	0,4028	0,0750	0,1772

According to the results in Table 2, the criterion with the highest level of importance was identified as *intellectual capital*. This criterion is followed by *governance* and *social capital*. The criterion with the lowest level of importance was identified as *natural capital*.

4.2. Application of the MULTIMOORA Method

The first step in the application stages of the MULTIMOORA method is the creation of the decision matrix, which is presented in Table 1. The process steps of the MULTIMOORA method are provided in the Appendix. After applying these process steps, the ranking results obtained from the Ratio System, the Reference Point Approach, and the Full Multiplicative Form were compared, and a final ranking was determined based on their dominance. The ranking results of the countries obtained by these methods, along with the data from the GSCI (2024) Report, are presented in Table 3.

Table 3. Results Table of the MULTIMOORA Method and the Global Sustainable Competitiveness Report

Country	The Ratio System	The Reference Point Approach	The Full Multiplicative Form	MULTIMOORA	GSCI (2024)
Türkiye	1	1	1	1	1
Kazakhstan	2	3	2	2	2
Kyrgyzstan	3	7	3	3	3
Uzbekistan	4	4	4	4	4
Tajikistan	6	8	8	8	8
Azerbaijan	5	5	5	5	5
Turkmenistan	8	6	6	6	6
Iran	7	2	7	7	7
Pakistan	9	9	9	9	9
Afghanistan	10	10	10	10	10

When Table 3 is examined, it is seen that Türkiye indicates the highest performance in terms of sustainable competitiveness according to the ranking results obtained from the MULTIMOORA method and the GSCI (2024) Report. Türkiye is followed by Kazakhstan and Kyrgyzstan, respectively. When the countries' sustainable competitiveness performance is evaluated from the perspective of the lowest-performing countries, it is determined that Afghanistan ranks last. Afghanistan is followed by Pakistan and Tajikistan, respectively.

5. DISCUSSION AND CONCLUSIONS

In today's global competitive environment, countries' ability to sustain their competitive power depends on their ability to manage social, environmental, and institutional dimensions in an integrated manner, as well as their economic performance. Sustainable competitiveness is not limited to financial gains; it also becomes possible by increasing social welfare and effectively protecting natural resources.

Within the scope of this study, the sustainable competitiveness performance of ECO member countries was evaluated using data from the GSCI (2024) report. In the report, countries were ranked in terms of sustainable competitiveness

performance based on seven criteria: *sustainable competitiveness*, *natural capital*, *resource intensity*, *social capital*, *intellectual capital*, *economic sustainability*, and *governance*. The analysis results revealed that *intellectual capital* was identified as the criterion with the highest level of importance, while *natural capital* was found to be the criterion with the lowest level of importance.

When countries are evaluated in terms of sustainable competitiveness performance, it is seen that Türkiye ranks first. It can be stated that Türkiye ranks first among the ECO member countries in terms of sustainable competitiveness performance as a result of its superior performance in intellectual capital accumulation, human development level, and governance quality (Emirkadı, 2020). In addition, the high rankings of Kazakhstan and Kyrgyzstan can be associated with their investments in social and intellectual capital in addition to economic growth. Afghanistan has experienced significant setbacks in economic and social development due to ongoing conflicts since the 1980s. In this process, concepts such as infrastructure investments, human capital development, and strengthening of institutional capacity have been neglected (Ortaq and Özer, 2023). This situation can be expressed as one of the reasons why Afghanistan ranks last in terms of sustainable competitiveness performance.

ECO countries that aim to strengthen their sustainable competitiveness performance should invest in intellectual capital and also enhance governance. In addition, supporting social welfare and using natural resources efficiently are issues of great importance for countries' sustainable competitiveness. Based on the analysis results, it can be suggested that countries ranking lower in performance should follow the policies of countries such as Türkiye, Kazakhstan, and Kyrgyzstan, which indicate high levels of sustainable competitiveness.

In future studies, the sustainable competitiveness performance of the same or different country groups can be examined using MCDM methods with similar or different analysis techniques. Additionally, the results obtained can be compared with indices published in previous years.

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Ethics Committee Approval

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Author Contributions

All authors contributed equally to the study.

Conflict of Interest

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Appendix

Entropy Method Process Steps

Table A1. Normalized decision matrix

Country	Sustainable Competitive ness	Natural Capital	Resource Intensity	Social Capital	Intellectual Capital	Economic Sustainability	Governance
Türkiye	0,121	0,116	0,113	0,091	0,161	0,122	0,125
Kazakhstan	0,115	0,101	0,102	0,123	0,113	0,116	0,133
Kyrgistan	0,107	0,114	0,102	0,129	0,094	0,102	0,100
Uzbekistan	0,104	0,093	0,085	0,116	0,107	0,100	0,121
Tajikistan	0,093	0,099	0,107	0,088	0,081	0,090	0,091
Azerbaijan	0,100	0,107	0,088	0,112	0,101	0,099	0,093
Turkmenistan	0,095	0,088	0,094	0,093	0,094	0,105	0,096
Iran	0,094	0,081	0,082	0,094	0,128	0,089	0,089
Pakistan	0,089	0,096	0,101	0,085	0,068	0,100	0,085
Afghanistan	0,082	0,104	0,125	0,070	0,053	0,076	0,068

Table A2. Entropy values for each criterion

Country	Sustainable Competitive ness	Natural Capital	Resource Intensity	Social Capital	Intellectual Capital	Economic Sustainability	Governance
Türkiye	-0,256	-0,250	-0,247	-0,218	-0,294	-0,257	-0,260
Kazakhstan	-0,249	-0,231	-0,233	-0,258	-0,246	-0,250	-0,268

Kyrgistan	-0,239	-0,248	-0,233	-0,264	-0,222	-0,232	-0,231
Uzbekistan	-0,236	-0,221	-0,210	-0,250	-0,240	-0,231	-0,256
Tajikistan	-0,220	-0,229	-0,240	-0,214	-0,203	-0,216	-0,219
Azerbaijan	-0,230	-0,239	-0,214	-0,245	-0,232	-0,229	-0,220
Turkmenistan	-0,224	-0,214	-0,222	-0,221	-0,222	-0,237	-0,225
Iran	-0,222	-0,204	-0,205	-0,222	-0,263	-0,215	-0,215
Pakistan	-0,215	-0,225	-0,231	-0,210	-0,184	-0,231	-0,209
Afghanistan	-0,205	-0,236	-0,260	-0,186	-0,155	-0,196	-0,182

MULTIMOORA Method Process Steps

Table A3. Normalized decision matrix

Country	Sustainable Competitiveness	Natural Capital	Resource Intensity	Social Capital	Intellectual Capital	Economic Sustainability	Governance
Türkiye	0,381	0,364	0,355	0,283	0,489	0,383	0,387
Kazakhstan	0,362	0,316	0,320	0,384	0,343	0,364	0,413
Kyrgistan	0,335	0,359	0,321	0,400	0,284	0,319	0,312
Uzbekistan	0,328	0,293	0,268	0,360	0,326	0,315	0,377
Tajikistan	0,291	0,313	0,337	0,274	0,245	0,281	0,284
Azerbaijan	0,314	0,337	0,275	0,349	0,308	0,311	0,287
Turkmenistan	0,298	0,277	0,295	0,289	0,284	0,331	0,297
Iran	0,295	0,255	0,257	0,292	0,389	0,279	0,276
Pakistan	0,280	0,303	0,316	0,265	0,208	0,315	0,262
Afghanistan	0,258	0,329	0,393	0,217	0,160	0,240	0,210

Table A4. Weighted normalization matrix and ratio matrix

Country	Sustainable Competitiveness	Natural Capital	Resource Intensity	Social Capital	Intellectual Capital	Economic Sustainability	Governance	Toplam	Rank
Türkiye	0,0236	0,0191	0,0272	0,0437	0,1971	0,0287	0,0686	0,4078	1
Kazakhstan	0,0224	0,0166	0,0244	0,0592	0,1383	0,0273	0,0732	0,3614	2
Kyrgistan	0,0207	0,0188	0,0245	0,0618	0,1144	0,0239	0,0553	0,3195	3
Uzbekistan	0,0203	0,0154	0,0204	0,0556	0,1314	0,0236	0,0668	0,3335	4
Tajikistan	0,0180	0,0164	0,0258	0,0422	0,0986	0,0211	0,0503	0,2724	6
Azerbaijan	0,0194	0,0177	0,0210	0,0539	0,1240	0,0234	0,0509	0,3103	5
Turkmenistan	0,0184	0,0145	0,0225	0,0446	0,1146	0,0248	0,0526	0,2921	8
Iran	0,0182	0,0134	0,0196	0,0450	0,1567	0,0210	0,0489	0,3228	7
Pakistan	0,0173	0,0159	0,0241	0,0409	0,0837	0,0236	0,0465	0,2520	9
Afghanistan	0,0159	0,0172	0,0300	0,0335	0,0643	0,0180	0,0371	0,2161	10

Table A5. Reference points

	Sustainable Competitiveness	Natural Capital	Resource Intensity	Social Capital	Intellectual Capital	Economic Sustainability	Governance
Reference Points	0,0236	0,0191	0,0300	0,0618	0,1971	0,0287	0,0732

Table A6. Calculation of the reference point matrix

Country	Sustainable Competitive ness	Natural Capital	Resource Intensity	Social Capital	Intellectu al Capital	Economic Sustainabil ity	Governa nce	MAK S	RAN K
Türkiye	0,0000	0,0000	0,0029	0,0181	0,0000	0,0000	0,0046	0,0181	1
Kazakhstan	0,0012	0,0025	0,0056	0,0025	0,0588	0,0014	0,0000	0,0588	3
Kyrgistan	0,0028	0,0002	0,0055	0,0000	0,0826	0,0048	0,0179	0,0826	7
Uzbekistan	0,0033	0,0037	0,0096	0,0061	0,0657	0,0051	0,0064	0,0657	4
Tajikistan	0,0056	0,0027	0,0043	0,0195	0,0985	0,0076	0,0229	0,0985	8
Azerbaijan	0,0042	0,0014	0,0090	0,0079	0,0730	0,0054	0,0223	0,0730	5
Turkmenist an	0,0051	0,0046	0,0075	0,0172	0,0825	0,0039	0,0205	0,0825	6
Iran	0,0053	0,0057	0,0104	0,0168	0,0403	0,0078	0,0243	0,0403	2
Pakistan	0,0063	0,0032	0,0059	0,0209	0,1133	0,0051	0,0267	0,1133	9
Afghanistan	0,0076	0,0019	0,0000	0,0283	0,1327	0,0107	0,0360	0,1327	10

Table A7. Calculation of the full multiplicative form

Countr y	1	2	2.1	3	3.1	4	4.1	5	5.1	6	6.1	7	7.1	Rank
	max	max	2.1:1 *2	max	3.1=2. 1*3	ma x	4.1=3. 1*4	max	5.1=4.1 *5	ma x	6.1=5.1 *6	max	7.1=6.1*7	
Türkiye	46,8	42,3	1980 ,98	42,7	84581, 67	35, 5	29998 19,33	62,0	1858862 52,56	46, 2	8584748 164,21	52,4	45003181 5738,95	1
Kazakhs tan	44,4	36,8	1634 ,41	38,4	62791, 72	48, 1	30211 98,76	43,5	1313830 33,77	43, 9	5764405 296,67	55,9	32238189 1851,28	2
Kyrgista n	41,2	41,8	1720 ,46	38,5	66312, 16	50, 2	33267 55,90	36,0	1197068 73,73	38, 5	4607192 787,54	42,3	19468226 2048,29	3
Uzbekis tan	40,3	34,1	1374 ,11	32,1	44166, 64	45, 2	19953 79,89	41,3	8243342 2,53	38, 0	3132092 381,20	51,0	15984966 8454,75	4
Tajikist an	35,8	36,3	1299 ,47	40,5	52617, 88	34, 3	18054 40,19	31,0	5597897 9,97	34, 0	1900742 961,04	38,4	73058144 427,23	8
Azerbaij an	38,6	39,2	1512 ,05	33,1	49993, 90	43, 8	21891 07,19	39,0	8538972 7,59	37, 6	3206951 042,78	38,9	12477252 8824,34	5
Turkme nistan	36,7	32,2	1179 ,05	35,4	41767, 28	36, 2	15129 17,31	36,0	5450910 8,29	39, 9	2176588 481,58	40,2	87553689 921,40	6
Iran	36,2	29,6	1072 ,92	30,9	33137, 25	36, 6	12112 64,70	49,3	5969620 8,56	33, 7	2012903 465,47	37,4	75197346 532,23	7
Pakistan	34,4	35,2	1209 ,44	37,9	45870, 19	33, 2	15229 67,79	26,3	4009020 1,18	38, 0	1524191 765,20	35,5	54158020 794,24	9
Afghani stan	31,7	38,2	1210 ,34	47,2	57188, 46	27, 2	15554 90,41	20,2	3145578 4,94	28, 9	9090631 10,49	28,4	25810234 725,48	10

Reforming the Albanian Pension System: Lessons from the Western Balkans and EU Models.

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Abstract: The ongoing reform of Albania's pension system unfolds within a complex interplay of demographic pressure, fiscal constraints, and structural inefficiencies inherited from past models. While the country has made notable strides in redesigning its public pension architecture, significant challenges remain in ensuring long-term sustainability, fairness and adequate coverage. This paper critically examines the current trajectory of pension reform in Albania by drawing comparative insights from selected Western Balkan countries such as North Macedonia, Serbia and Montenegro and established EU members states with successful multi-pillar systems, notably Poland and Sweden. Through a qualitative and policy-oriented approach, this study identifies key elements that have contributed to more resilient pension system across the region, including parametric reforms, diversification of funding sources, and the role of private and voluntary schemes. The analysis underscores the importance of institutional capacity, public trust and political continuity in implementing reforms that go beyond technical adjustments. Furthermore, the paper assesses Albania's alignment with EU social protection standards and explores the potential for policy transfer or adaption. By synthesizing lessons learned from comparable contexts, this research offers a set of strategic recommendations tailored to Albania's economic, demographic and institutional realities. The findings aim to inform policymakers and stakeholders on how to navigate the reform process in a way that balances fiscal responsibility with social equity and intergenerational fairness.

Key Words: Pension Reform, Social Protection, Fiscal Sustainability, Private Pensions, EU Pension Models.

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INTRODUCTION

The pension system in Albania is a legacy of its centralized socialist past. This system was initially based on a pay-as-you-go (PAYG) structure that was managed solely by the state, but after the transition of the 1990s, when Albania moved from a closed economy to a market economy, rapid demographic changes and economic informality placed high growth stress on the pension fund system (World Bank, 2022). With the declining birth rate and increasing life expectancy of Albanian individuals, the old-age dependency ratio in Albania is projected to increase from 30% in 2024 to over 40% by 2050 (Eurostat, 2023). Meanwhile, fiscal constraints have further complicated the issue, as contributions continue to remain low due to widespread informal work. Through this paper, it is intended to examine all of Albania's reform efforts within this extremely challenging context, as well as to assess its compliance based on EU norms and standards, and to draw lessons from the Western Balkans but also from successful EU member states.

In addition, the post-1990 transition involved fragmented reform attempts, often hindered by political instability and limited administrative capacity. Key legislative changes included the 1993 Social Insurance Law and subsequent amendments, but institutional inertia delayed effective implementation of multi-pillar systems.

Some of the most important existing literature highlights the move from PAYG models to more diverse systems with multiple pillars that will work towards a more sustainable path (Holzmann & Hinz, 2005). Numerous comparative studies (OECD, 2019; Arza & Kohli, 2008) in fact emphasize the sustainability of pension schemes that combine public guarantees with various private savings mechanisms. Research conducted in the Western Balkans reveals some mixed successes: Serbia has implemented parametric reforms (IMF, 2020), while North Macedonia has adopted a second pillar system (KPMG, 2022), while Montenegro continues to struggle with deficits (World Bank, 2022). Looking beyond the Western Balkans, Sweden's Notional Defined Contribution (NDC) and Poland's modified multi-pillar model are in fact often highlighted as ideal examples for their innovation and sustainability (Gora & Palmer, 2004).

The methodology used in this paper is in fact a qualitative comparative analysis, which is based mainly on various policy documents of the Western Balkans and several European countries, on EU reports, but also on various national statistics as well as on academic literature. The selection of cases used in this paper includes North Macedonia, Serbia, Montenegro (similar stages of reforms) and Poland and Sweden (advanced EU systems). Meanwhile, the main indicators analyzed in this paper are contribution rates, dependency ratios, coverage levels and system financing.

2. ANALYSIS OF ALBANIA'S PENSION REFORM TRAJECTORY

If we were to analyze all the Reforms since 2014 in Albania, we would come to the conclusion that these reforms aimed at unifying all rural and urban schemes as well as adjusting the retirement age. However, despite these reforms, the benefits remain insufficient as the average pension in 2023 actually covers only 39% of the average wage (Ministry of Finance, 2023). Meanwhile, informal work is estimated at 37% of employment and limits a good part of the contributions (ILO, 2017). Private pensions in Albania represent only 0.1% of GDP, a rate much lower than those of regional countries (World Bank, 2022).

2.1. Comparative Insights from Selected Countries

Figure 2.1.1: Retirement Age vs. Pension Adequacy by Country (2024)

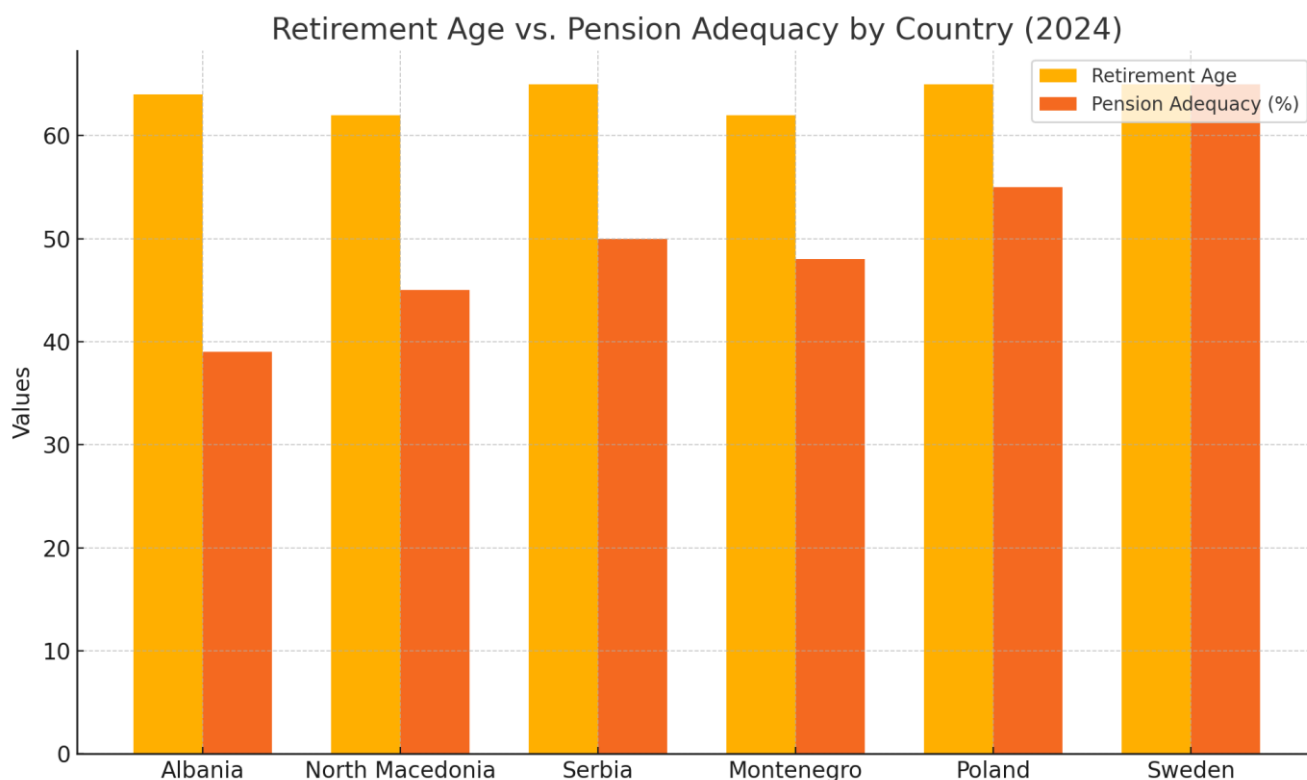


Figure 2.1.2: Pension Expenditure as % of GDP (2015–2024)

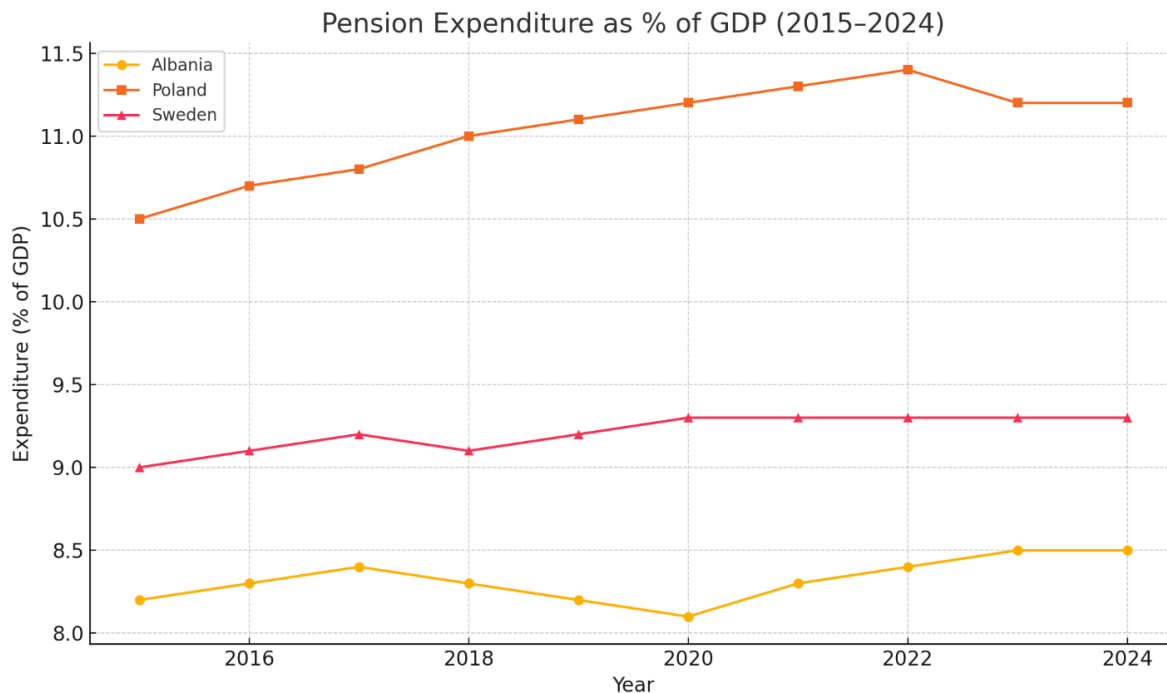


Figure 2.1.3: Comparative Indicators for Pension Systems (2024)

Table: Overview of Pension Systems in Selected Countries Country | System Type | Retirement Age | Contribution Rate | Avg. Pension (% of wage)
 North Macedonia | Mixed (PAYG+2nd) | 62/64 | 18% | 44%
 Serbia | PAYG | 63/65 | 26% | 55%
 Montenegro | PAYG | 62/66 | 24% | 42%
 Poland | Multi-Pillar | 60/65 | 19.5% | 58%
 Sweden | NDC+Private | 62/67 | 18.5% | 65%

Country	Pension Expenditure (% of GDP)	Average Retirement Age	Private Pension Coverage (%)	Public Pension Adequacy (%)
Albania	8.5	64	1.2	39
North Macedonia	10.2	62	3.5	45
Serbia	11.7	65	7.0	50
Montenegro	11.0	62	5.8	48
Poland	11.2	65	25.0	55
Sweden	9.3	65	33.0	65

The Western Balkan countries and the reforms that North Macedonia followed actually brought about the introduction of mandatory funded accounts, but on the other hand suffered from very high administrative costs (Ministry of Labor, 2020). Serbia on the other hand followed the reform of increasing the retirement age and significantly improved fiscal sustainability (IMF, 2020). Meanwhile, if we look at the Montenegrin system, the pension reform in this country remains burdensome from a fiscal point of view and clearly lacks diversification.

EU Member States Sweden's NDC system, complemented by individual savings accounts, ensures long-term stability and intergenerational fairness (Swedish Pensions Agency, 2023). Poland initially adopted a second pillar with mandatory contributions, but reversed this in 2014 amid fiscal concerns, maintaining a hybrid structure (Polish Ministry of Family, 2022).

3. KEY FACTORS FOR RESILIENT PENSION SYSTEMS

Parametric adjustments (retirement age, indexation formulas) have proven effective (Barr & Diamond, 2008). Diversified funding—including voluntary and occupational pensions—improves long-term viability. Institutional trust, administrative efficiency, and political continuity remain critical enablers (Hinrichs & Jessoula, 2012).

A high-performing regulatory authority is also essential. Sweden's Financial Supervisory Authority (Finansinspektionen), for instance, oversees private funds rigorously, ensuring transparency, solvency, and contributor confidence.

Alignment with EU Social Protection Standards, Albania's system shows partial compliance with the European Pillar of Social Rights. Gaps include pension adequacy and access for informal workers (European Commission, 2023). Expanding the private pillar and gender-sensitive policies could improve alignment.

4. STRATEGIC RECOMMENDATIONS FOR ALBANIA

To build a comprehensive pension system, Albania must go decisively towards developing a three-pillar architecture. Priority should be given to strengthening the second and third pillar - especially private and voluntary pension schemes - to diversify financial risk and reduce long-term pressure on public finances.

- Develop a coherent three-pillar strategy that includes mandatory public pensions, professional pensions and stimulated voluntary savings. Each pillar must have fiscal objectives and clearly defined accountability mechanisms.
- Improve the implementation of compliance of contributions to the informal economy through digital monitoring tools and interagency cooperation.
- Expand fiscal incentives for voluntary pension savings, including tax discounts and relevant contributions, to stimulate long-term individual participation.

It is also essential to clearly define how each pillar will be financed and managed, including actuarial analysis of long-term fiscal sustainability. For example, the public PAYG pillar should be fiscally neutral, while voluntary private schemes may rely on tax-deferred contributions.

- Create a regulatory environment for private pension fund management, with a focus on transparency, capital market development and fiduciary responsibility.
- Promote campaigns for financial knowledge and awareness that educate the public on the benefits of early pension planning, targeting young workers and women.
- To implement gender-sensitive reforms to address pension rights inequalities, including credit of care periods and incentives for women's participation in the workforce.
- Input automatic registration mechanisms in voluntary schemes to increase coverage and participation.
- Ensure independent supervision and strong governance of private pension institutions to maintain public trust and protect contributors.

Additionally, Albania should consider launching a National Pension Reform Plan with parliamentary approval, ensuring multi-party consensus and long-term continuity. An important yet overlooked potential lies in engaging the Albanian diaspora, enabling them to participate in voluntary pension schemes through digital platforms.

5. CONCLUSION

The pension reform process in Albania remains incomplete and exposed to significant demographic, economic and institutional weaknesses. Comparative experiences from the Western Balkans and EU member states clearly show that long-term sustainability cannot be achieved by relying on public pension schemes. Instead, the strategic emphasis should be put on the creation and expansion of private pension components.

Successful examples of Sweden and Poland highlight that a balanced multi-star approach - backed by sound government, public trust and active state support - can provide better suitability and consistency over time. Albania must take bold steps to modernize its pension framework by encouraging private savings, integrating informal workers and ensuring reforms promote equality between generations and genders.

After all, aligning with EU social protection standards requires technical and political engagement. By investing in increasing private pensions and adopting comprehensive and future-oriented strategies, Albania can build a pension system that supports economic stability, protect future pensioners and fosters intergenerational solidarity.

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Transformational Leadership as a Driver of Job Engagement: A Structured Review

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Abstract: Employee engagement has emerged as a critical component of organizational success, with research demonstrating its importance in promoting performance, retention, and innovation. Job engagement is a psychological state characterized by enthusiasm, commitment, and absorption. It is defined as a psychological state marked by enthusiasm, dedication, and immersion in one's work, resulting in a strong emotional and cognitive bond between employees and their roles. As the value of engagement expands across industries, attention has shifted toward leadership approaches capable of fostering and maintaining high levels of engagement. Transformational leadership has emerged as one of the most influential styles. This leadership style focuses on inspiring, motivating, and independently supporting employees. Transformational leadership entails motivating and supporting employees on an individual basis. This leadership style fosters psychological safety, a sense of meaningfulness, and intrinsic motivation, which contributes to team trust and empowerment while significantly increasing job engagement. This research paper aims to better understand the relationship between transformational leadership and work engagement. The purpose of this study is to investigate the relationship between transformational leadership and job engagement by conducting a structured review of existing literature. This literature review provides a thorough understanding of how transformational leadership affects employee engagement by systematically analyzing previous research and synthesizing key themes and findings. The findings are intended to inform both academic discourse and practical leadership strategies for increasing employee engagement and productivity.

Keywords: Transformational Leadership, Job Engagement, Employee Motivation, empowerment

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Introduction

Employee engagement has evolved as an important component of workplace sustainability and performance in today's rapidly changing business landscape. Improved performance, lower turnover, and improved organizational commitment are all associated with job engagement, which is a positive mental state characterized by enthusiasm, dedication, and absorption (Schaufeli et al., 2002; Rich et al., 2010). As firms strive to promote employee engagement, leadership has emerged as a critical factor of motivation, psychological health, and job connection (Bakker and Demerouti, 2008). Transformational leadership, in particular, has attracted the curiosity of scholars due to its potential to inspire and help followers flourish. This leadership style is defined by four characteristics: intellectual stimulation, customized consideration, inspirational motivation, and idealized influence (Bass and Riggio, 2006). Transformational leaders must empower employees, build trust, stimulate creativity, and develop strong connections to company goals to boost engagement (Avolio & Bass, 2004; Kahn, 1990).

This paper presents a literature review that synthesizes findings from existing research on the relationship between transformational leadership and employee engagement. The objective is to identify consistent patterns, theoretical perspectives, and research gaps, offering a clearer understanding of how leadership can be leveraged to enhance employee engagement. This review aims to contribute to academic scholarship and offer practical insights for organizations seeking to foster a motivated and high-performing workforce.

2. Literature Review

2.1 Transformational Leadership

Transformational leadership is a prominent leadership approach that emphasizes inspiring and motivating followers to place organizational goals above personal interests (Bass, 1985). Rather than relying on authority or control, transformational leaders engage followers by fostering a shared vision, encouraging innovation, and providing individualized support (Bass & Riggio, 2006; Northouse, 2018). This style of leadership is built on four core dimensions: idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration.

At the heart of transformational leadership is idealized influence, where leaders serve as ethical role models whose actions earn the trust, respect, and admiration of their followers. These leaders embody the values they promote, fostering a strong sense of identification and commitment among team members. Closely tied to this is inspirational motivation, through which leaders articulate an engaging vision of the future, use symbolic actions, and deliver emotionally resonant messages to elevate followers' sense of purpose (Shamir et al., 1993). This collective sense of mission and high expectations strengthens organizational cohesion and drives commitment (Judge & Piccolo, 2004).

Complementing these emotional and value-driven elements is intellectual stimulation, which encourages creativity and challenges conventional thinking. Transformational leaders promote problem-solving by questioning assumptions, fostering critical reflection, and supporting innovative approaches (Avolio & Bass, 2004). This approach nurtures a culture of continuous learning and adaptability, which is essential in dynamic and complex environments (Eisenbeiss et al., 2008). In parallel, individualized consideration ensures that leaders remain attuned to the unique needs and aspirations of each follower. By acting as mentors or coaches, they offer tailored support, constructive feedback, and growth opportunities, thereby strengthening interpersonal trust and enhancing the leader–follower relationship (Ilies et al., 2005). This personalized attention boosts confidence and contributes to a more inclusive and empowering workplace.

From an organizational perspective, transformational leaders are instrumental in building high-performing teams. By motivating individuals to transcend personal interests and commit to broader objectives, they cultivate a results-driven culture with long-term benefits (Bass & Avolio, 1994; Lowe et al., 1996). Their focus on development, vision, and innovation is closely tied to sustained performance outcomes (Dvir et al., 2002). While the concept of transformational leadership emerged in Western contexts, it has shown strong cross-cultural relevance. Core elements such as inspirational motivation and ethical conduct are valued across various cultural settings (Den Hartog et al., 1999; House et al., 2004). Nonetheless, the interpretation and expression of these behaviors may vary depending on cultural norms and leadership expectations (Dickson et al., 2003).

Despite its strengths, transformational leadership is not without criticism. Some scholars argue that it can be overly idealistic, abstract, or ambiguous in practical application (Yukl, 1999). Additionally, there are concerns that it may overemphasize charisma while neglecting essential task-oriented behaviors needed in certain organizational contexts (Antonakis et al., 2003). However, when applied thoughtfully and contextually, transformational leadership remains one of the most influential and effective frameworks in contemporary leadership research and practice (Bass & Riggio, 2006).

2.2 Job Engagement

Job engagement refers to a positive, fulfilling state of mind characterized by vigor, dedication, and absorption (Schaufeli et al., 2002). Unlike passive job satisfaction, engagement involves the active use of cognitive, emotional, and physical resources in work (Kahn, 1990), often accompanied by enthusiasm and psychological presence (Rich, et al, 2010). Vigor denotes high energy and resilience, dedication reflects involvement and a sense of purpose, and absorption indicates full concentration and immersion in tasks (Schaufeli & Bakker, 2004; Bakker et al., 2008).

Engagement is shaped by both job resources—such as autonomy, feedback, and social support—and personal resources like self-efficacy and optimism (Bakker & Demerouti, 2007; Xanthopoulou et al., 2007). Leadership, especially of the transformational type, plays a key role by fostering supportive environments and aligning work with individual values (Tim et al., 2011). Such leadership contributes to psychological safety and meaning, increasing employees' willingness to invest in their roles (Kahn, 1990; Breevaart et al., 2014).

A valuable framework for understanding employee engagement is the Job Demands–Resources (JD-R) model, which proposes that engagement emerges when job resources—such as autonomy, feedback, and support—are sufficient to meet job demands and foster employee development (Demerouti et al., 2001). When this balance is achieved, it leads to higher levels of motivation, organizational commitment, and psychological well-being (Schaufeli & Taris, 2014).

Engagement, in turn, contributes to a range of positive outcomes, including enhanced performance, greater creativity, increased organizational citizenship behaviors, and reduced absenteeism (Salanova & Schaufeli, 2008; Harter et al., 2002). Conceptually, it is viewed as the positive counterpart to burnout: whereas burnout is characterized by exhaustion and detachment, engagement reflects energy, dedication, and active involvement in one's work (Maslach et al., 2001).

The experience of engagement is further reinforced when employees find psychological meaningfulness in their work—when tasks align with their personal values and sense of identity (May et al., 2004; Shuck & Wollard, 2010). However, the extent and expression of engagement may vary across cultural and demographic contexts. For instance, collectivist cultures tend to emphasize interpersonal connection as a driver of engagement, whereas individualist cultures may prioritize autonomy and self-expression. Similarly, younger employees may be more motivated by development opportunities, while older employees may value job security and stability (Saks, 2006; Truss et al., 2013).

To foster and sustain engagement, organizations should cultivate environments that promote autonomy, offer recognition and feedback, support employee growth, and build inclusive and trusting cultures (Mone & London, 2010; Albrecht, 2010). Theoretically, the JD-R model highlights the crucial role of leadership as a job resource that can buffer job demands and enhance engagement. In particular, transformational leadership contributes to a highly engaged workforce by fostering a shared vision, building trust, and creating psychologically safe and supportive environments.

2.3 Transformational Leadership and Job engagement

Transformational leadership has been widely recognized as a significant predictor of job engagement across various organizational contexts (Bono & Judge, 2003). This leadership style, which emphasizes inspiration, intellectual stimulation, and individualized consideration, creates a psychologically safe environment that fosters motivation and emotional investment in work (Bass & Riggio, 2006). By articulating a compelling vision and supporting followers' personal development, transformational leaders satisfy employees' psychological needs for autonomy, competence, and relatedness, which are central to engagement (Deci & Ryan, 2000). The impact of transformational leadership extends beyond individual development. Empirical research has linked this style to higher levels of employee engagement, marked by increased energy, enthusiasm, and absorption in work tasks (Schaufeli et al., 2002). Leaders who connect emotionally with their followers enhance intrinsic motivation and foster stronger organizational commitment, ultimately improving productivity and reducing turnover (Breevaart et al., 2014).

Furthermore, transformational leadership is positively associated with job satisfaction, as employees feel recognized, supported, and aligned with a shared organizational vision (Walumbwa et al., 2005). This satisfaction, in turn, contributes to positive organizational behaviors such as cooperation, loyalty, and higher performance (Epitropaki & Martin, 2005). Furthermore, the Job Demands-Resources (JD-R) model provides a useful framework for understanding this relationship. Transformational leaders often serve as a source of job resources—such as support, feedback, and developmental opportunities—that buffer the effects of job demands and enhance engagement (Bakker & Demerouti, 2007). These resources not only mitigate stress but also fuel employees' intrinsic motivation, resulting in sustained engagement even under challenging conditions (Bakker et al., 2014).

Several studies have also indicated that engagement mediates the relationship between transformational leadership and outcomes such as job satisfaction, commitment, and task performance (Saks, 2006; Macey & Schneider, 2008). Thus, the influence of transformational leadership on engagement is both direct and indirect, operating through the enrichment of the work environment and the fulfillment of psychological needs. Understanding this relationship is critical for organizations aiming to enhance employee engagement through effective leadership practices.

3. Methodology:

This study employs a literature-based approach to investigate the relationship between transformational leadership and job engagement. The goal is to synthesize existing theoretical and empirical insights, track key conceptual developments, and identify recurring findings in the scholarly literature. Peer-reviewed journal articles, academic books, and empirical studies from the fields of organizational behavior, human resource management, and leadership studies were examined. Selection criteria prioritized thematic relevance, specifically works that directly address transformational leadership and its impact on employee engagement. This integrative approach facilitates the development of a nuanced understanding of how transformational leadership affects job engagement, laying the groundwork for future research and practical applications in organizational settings.

4. Discussion:

This study confirms the strong positive relationship between transformational leadership and job engagement, as widely supported in existing literature. Transformational leaders—through idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration—create environments that nurture employee energy, dedication, and focus (Bass & Riggio, 2006). These leadership behaviors enhance the psychological and emotional connection employees have with their work, thereby increasing engagement levels across various organizational contexts.

Furthermore, the findings highlight that transformational leadership contributes to psychological conditions necessary for engagement, such as meaningfulness and trust (Kahn, 1990). Leaders who offer clear vision, demonstrate support, and empower employees help create a culture where individuals feel valued and secure in expressing themselves. However, the effectiveness of this leadership style may vary depending on contextual factors like organizational culture, workload, and sector-specific challenges, which can either facilitate or constrain employee engagement (Bakker & Demerouti, 2007).

From a practical perspective, the discussion emphasizes the need for leadership development initiatives focused on cultivating transformational behaviors. Training managers to lead with vision, empathy, and innovation can significantly

improve employee engagement and, by extension, organizational performance. Future research should consider empirical studies in specific sectors or regions to validate and expand these findings, offering more targeted insights for practitioners and policymakers.

5. Implications

The findings of this study offer meaningful implications for both organizational leaders and human resource practitioners. First, organizations seeking to improve employee engagement should prioritize the development and implementation of transformational leadership practices. Leaders who demonstrate vision, empathy, intellectual stimulation, and individualized support are more likely to foster a psychologically safe and motivating environment where employees feel energized and committed (Bass & Riggio, 2006; Kahn, 1990). By investing in leadership development programs and coaching initiatives that cultivate these behaviors, organizations can enhance not only engagement but also performance, innovation, and retention (Tims et al., 2011).

Moreover, the implications extend to strategic HR policies, including recruitment, performance management, and organizational culture design. Human resource departments should consider transformational leadership competencies as essential criteria in hiring and promotion decisions, especially for managerial roles. Additionally, integrating engagement metrics into performance evaluations can reinforce the value of leadership behaviors that promote employee well-being (Bakker & Demerouti, 2007). Fostering a culture that supports open communication, feedback, and professional growth will enable leaders to act as catalysts of engagement, ultimately contributing to a more resilient and productive workforce.

Conclusion

This study examined the impact of transformational leadership on job engagement, drawing on existing literature to explore how leadership behaviors influence employees' emotional and psychological involvement at work. The review highlights that transformational leaders—through vision, support, and intellectual stimulation—can foster environments where employees feel motivated, valued, and aligned with organizational goals. Such conditions significantly enhance the core dimensions of engagement: vigor, dedication, and absorption.

The evidence consistently shows that transformational leadership positively correlates with higher levels of job engagement across various organizational contexts. Engaged employees tend to perform better, show greater organizational commitment, and contribute to a positive work culture. These findings underscore the importance of leadership development programs aimed at cultivating transformational behaviors, not only to improve individual performance but also to strengthen overall organizational health and sustainability.

Given the central role of leadership in shaping employee engagement, future research is encouraged to test these findings in specific industries or cultural contexts using empirical data. Doing so will help validate the theoretical insights presented and provide organizations with targeted strategies for enhancing leadership effectiveness and workforce engagement. In an increasingly complex and competitive world, transformational leadership remains a powerful tool for building committed, resilient, and high-performing teams.

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The Impact Of Digital Economy On International Trade Structure: The Rise Of E-Export And Policy Recommendations

MURAT ALKIN

Abstract: This study explores the impact of the digital economy on the structure of international trade, focusing on the rise of e-export and relevant policy recommendations. Digitalization has transformed all phases of trade—from production and logistics to marketing and customer relations—introducing both new opportunities and challenges, particularly in cross-border digital commerce. E-export, by overcoming the spatial and logistical limitations of traditional export models, has enabled especially SMEs and developing countries to access global markets more efficiently. However, structural obstacles such as insufficient digital infrastructure, regulatory discrepancies, lack of digital skills, and data security concerns limit the full realization of this potential. Accordingly, the study proposes a set of multi-level policy measures, including strengthening digital infrastructure, enhancing e-logistics systems, fostering international regulatory harmonization, and expanding support mechanisms for SMEs. The paper aims to provide a theoretical framework and strategic recommendations to ensure a more inclusive and sustainable participation in the digital economy.

Keywords: Digital economy, e-export, international trade, digital transformation, policy recommendations

Dijital Ekonominin Uluslararası Ticaret Yapısı Üzerindeki Etkisi: E-İhracatın Yükselişi ve Politika Önerileri

Özet: Bu çalışma, dijital ekonominin uluslararası ticaret yapısı üzerindeki etkilerini inceleyerek, e-ihracatın yükselen rolünü ve bu çerçevede geliştirilebilecek politika önerilerini ele almaktadır. Dijitalleşme, üretimden lojistiğe, pazarlamadan müşteri ilişkilerine kadar tüm ticaret süreçlerini dönüştürmüştür; özellikle sınır ötesi dijital ticaret, firmalar için yeni fırsatlar ve zorluklar yaratmıştır. E-ihracat, geleneksel ihracatın lojistik ve coğrafi sınırlarını aşan bir yapı sunarak, özellikle KOBİ'ler ve gelişmekte olan ülkeler için küresel pazarlara erişimi kolaylaştırmıştır. Ancak dijital altyapı eksiklikleri, regülasyon farklılıkları, dijital beceri yetersizlikleri ve veri güvenliği gibi yapısal engeller, e-ihracatın potansiyelinden tam anlamıyla yararlanılmasını sınırlamaktadır. Bu bağlamda, çalışmada dijital altyapının güçlendirilmesi, e-lojistik sistemlerin geliştirilmesi, uluslararası uyumlu düzenlemelerin teşvik edilmesi ve KOBİ'lere yönelik destek mekanizmalarının genişletilmesi gibi çok düzeyli politika önerileri sunulmuştur. Çalışma, dijital ekonominin sunduğu fırsatlardan kapsayıcı biçimde yararlanılması için kuramsal bir çerçeve ve uygulamaya dönük stratejik öneriler geliştirmeyi amaçlamaktadır.

Anahtar Kelimeler: Dijital ekonomi, e-ihracat, uluslararası ticaret, dijital dönüşüm, politika önerileri

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GİRİŞ

Küreselleşme ve dijitalleşme süreçlerinin eş zamanlı olarak hız kazanması, ekonomik yapıları ve ticaret ilişkilerini derinden dönüştürmektedir. Özellikle 21. yüzyılın başlarından itibaren dijital teknolojilerin gelişimiyle birlikte, üretimden dağıtım, tüketim alışkanlıklarından ticaret modellerine kadar birçok alanda köklü değişimler yaşanmaktadır. Bu dönüşümün en belirgin etkilerinden biri de uluslararası ticaretin yapısal evrimidir. Geleneksel sınır ötesi ticaret anlayışının yerini giderek daha fazla dijital ortamda gerçekleşen işlemler almakta; fiziksel ürünlerin dijital platformlar üzerinden pazarlanması ve satışı yaygınlaşmaktadır. Bu çerçevede dijital ekonomi, sadece yeni bir ekonomik model olarak değil, aynı zamanda küresel ticaretin yeniden şekillenmesini sağlayan temel bir dinamik olarak öne çıkmaktadır.

Dijital ekonominin sunduğu olanaklar sayesinde küçük ve orta ölçekli işletmelerin (KOBİ'lerin) sınır ötesi pazarlara erişimi kolaylaşmakta; e-ticaret ve özellikle e-ihracat uygulamaları, geleneksel ihracatın önündeki birçok engeli ortadan kaldırarak yeni bir ticaret paradigmasını ortaya koymaktadır. E-ihracat, dijital altyapı sayesinde ürün ve hizmetlerin doğrudan son kullanıcıya ulaştırıldığı, daha düşük maliyetli, hızlı ve esnek bir ticaret biçimi olarak tanımlanmaktadır. Bu yapı, yalnızca ekonomik aktörlerin davranışlarını değil, aynı zamanda devletlerin ticaret ve kalkınma politikalarını da yeniden şekillendirmektedir.

Ancak dijitalleşen uluslararası ticaretin avantajlarının yanı sıra çok katmanlı bazı zorlukları da bulunmaktadır. Dijital altyapı eşitsizlikleri, veri regülasyonları, dijital güvenlik sorunları ve sınır ötesi vergi düzenlemeleri gibi karmaşık alanlar, dijital ekonominin sunduğu fırsatların etkin bir şekilde kullanılmasının önünde engel teşkil etmektedir. Ayrıca, dijitalleşmenin etkisinin ülkeler arasında ve hatta sektörler arasında homojen dağılmadığı da dikkat çekicidir.

Çalışma, dijital ekonominin uluslararası ticaret üzerindeki yapısal etkilerini, e-ihracatın yükselişi bağlamında ele almakta ve bu dönüşümün politik, ekonomik ve yönetsel boyutlarını bütüncül bir yaklaşımla tartışmayı amaçlamaktadır. Derleme yöntemiyle hazırlanan bu makalede öncelikle dijital ekonominin kuramsal çerçevesi çizilecek, ardından uluslararası ticaretin dönüşen yapısı, e-ihracatın gelişimi, karşılaşılan zorluklar ve farklı ülke uygulamaları üzerinden değerlendirilecektir. Son olarak, dijital ticaretin sürdürülebilir ve kapsayıcı hale gelmesi için politika yapıcılara yönelik çeşitli önerilere yer verilecektir.

1. Kavramsal Çerçeve: Dijital Ekonomiye Anlamak

Dijital ekonomi, dijital teknolojilerin üretim, dağıtım, tüketim ve kamu hizmetleri gibi ekonomik faaliyetlere entegre edilmesini ifade etmektedir. İlk olarak Don Tapscott tarafından "dijitalleşmiş ekonomik sistem" anlamında kullanılan bu kavram, zamanla bilgi ve iletişim teknolojileri (BİT) altyapısı üzerinde şekillenen ekonomik yapılar için kullanılmaya başlanmıştır (Tapscott, 1996; Karaçor, 2020).

Birleşmiş Milletler Ticaret ve Kalkınma Konferansı (UNCTAD), dijital ekonomiye "ekonomik çıktının dijital girdilerle yaratıldığı bir sistem" olarak tanımlar; bu bağlamda dijital ekonomi sadece e-ticareti değil, aynı zamanda veri akışı, dijital finans, dijital üretim ve hizmetleri de kapsamaktadır (UNCTAD, 2019). OECD'ye göre ise dijital ekonomi, sayısal teknolojilerin yoğun biçimde kullanıldığı tüm ekonomik faaliyetleri içerir; sadece dijital sektördeki işletmeleri değil, bu teknolojileri kullanan tüm sektörleri içine alır (OECD, 2020). Bu yönüyle dijital ekonomi, klasik sektör ayrımlarını bulanıklaştırarak disiplinlerarası bir yapı sergiler.

Dijital ekonominin temel bileşenleri üç ana eksenle toplanabilir: dijital altyapı, dijital platformlar ve veri akışı. Dijital altyapı, geniş bant internet bağlantısı, veri merkezleri, bulut teknolojileri ve nesnelerin interneti (IoT) gibi teknolojik sistemleri içerir. Altyapının yeterliliği, ülkelerin dijital ekonomiye entegrasyon kapasitesini doğrudan etkiler (ITU, 2022; Nordhaus, 2001).

Dijital platformlar ise üretici, tüketici ve aracıları aynı ağ üzerinde buluşturarak ekonomik değer yaratımını kolaylaştıran yapılar olarak tanımlanır. E-ticaret platformları (Amazon, Alibaba), dijital hizmet sağlayıcılar (Uber, Airbnb) ve sosyal medya ağları (Facebook, TikTok) bu kapsamdadır (Kenney ve Zysman, 2016). Bu platformlar yalnızca ekonomik işlemleri dönüştürmekle kalmaz, aynı zamanda piyasa dinamiklerini de yeniden yapılandırır.

Veri akışı ise dijital ekonominin "yeni petrolü" olarak kabul edilmektedir. Hem kullanıcı hem işlem verileri, karar alma, kişiselleştirme, otomasyon ve ticaret politikaları için kritik rol oynamaktadır (Manyika vd., 2016). Ancak bu verilerin sınır ötesi hareketliliği, veri güvenliği, mülkiyet hakları ve regülasyon açısından da ciddi tartışmalara yol açmaktadır.

Sıklıkla birbirinin yerine kullanılan "sayısallaştırma" (digitization) ve "dijitalleşme" (digitalization) kavramları aslında farklı süreçlere işaret eder. Sayısallaştırma, analog verilerin dijital forma dönüştürülmesi sürecidir. Örneğin bir kitap sayfasının PDF'ye çevrilmesi bu kapsama girer. Dijitalleşme ise bu dijital verilerin ekonomik ve organizasyonel süreçlerde aktif biçimde kullanılmasıdır (Brennen ve Kreiss, 2016). Dolayısıyla dijitalleşme, dijital teknolojilerin entegre edilerek iş süreçlerinin yeniden yapılandırılması anlamına gelir.

Bu ayrım, dijital ekonominin analizinde büyük önem taşır. Zira bir toplum ya da işletme, yüksek düzeyde sayısallaşmış olsa bile, dijital dönüşüm gerçekleştirmemiş olabilir. Ekonomik ve toplumsal fayda yaratımı için dijitalleşme düzeyinin artırılması gereklidir (Schwab, 2017).

2. Dijital Çağda Uluslararası Ticaretin Dönüşümü

Dijital teknolojilerin gelişimi, uluslararası ticaretin yapısını köklü biçimde değiştirmiştir. Geleneksel ticaret, fiziki ürünlerin sınır ötesi taşınmasına dayanırken; dijital ticaret, ürün ve hizmetlerin elektronik ortamda sunulmasını mümkün kılar. Bu dönüşüm, e-ticaret ve dijital hizmetlerin yükselişiyle birlikte daha düşük maliyetli, daha hızlı ve esnek bir ticaret ortamı yaratmıştır (UNCTAD, 2021; WTO, 2020).

Bu yapısal değişimde Bilgi ve İletişim Teknolojileri (ICT) belirleyici rol oynamaktadır. Geniş bant internet, mobil iletişim, dijital ödeme sistemleri ve bulut teknolojileri, dijital ticaretin temel altyapısını oluşturur (World Bank, 2021). Bu altyapı sayesinde sınır ötesi işlemler kolaylaşmakta, tedarik zincirleri dijitalleşmekte ve yeni ticaret modelleri ortaya çıkmaktadır.

Dijital çağda uluslararası ticaret, bazı yeni eğilimlerle daha da şekillenmektedir. Platform ekonomisi, Amazon ve Alibaba gibi dijital pazaryerleri aracılığıyla üretici ile tüketici arasında doğrudan bağlantı kurarak ticareti kolaylaştırmaktadır (Kenney ve Zysman, 2016). Algoritmik fiyatlama, anlık veri akışına göre fiyatların otomatik ayarlandığı rekabetçi sistemler sunarken (Einav ve Levin, 2014), blokzincir teknolojisi ise ticari işlemlerde güven, izlenebilirlik ve şeffaflık sağlamaktadır (Mougayar, 2016). Tüm bu gelişmeler, dijital ekonominin yalnızca bir teknoloji meselesi değil, aynı zamanda küresel ticaretin kurallarını yeniden yazan bir yapı olduğunu göstermektedir.

3. E-İhracatın Yükselişi ve Gelişimi

E-ihracat, dijital teknolojilerin uluslararası ticaret alanına entegre edilmesiyle ortaya çıkan ve malların ya da hizmetlerin dijital platformlar aracılığıyla sınır ötesi satışını ifade eden bir ticaret biçimidir. Geleneksel ihracattan farklı olarak fiziksel araçların rolü azalmış, işlemler elektronik ortamda gerçekleşmeye başlamıştır (Turban vd., 2017). Bu sayede, firmalar zaman ve mekân sınırlamalarını aşarak küresel pazarlara daha düşük maliyetlerle erişebilir hâle gelmiştir (Lendle vd., 2016).

E-ihracatın büyümesini tetikleyen başlıca faktörler arasında dijital pazaryerlerinin yaygınlaşması, yüksek hızlı internet altyapısı, dijital ödeme sistemleri ve bulut bilişim çözümleri yer almaktadır (Kraemer-Mbula vd., 2023). Özellikle Amazon, Alibaba ve Etsy gibi uluslararası platformlar, KOBİ'lere doğrudan yurtdışına satış yapma imkânı tanımakta ve yeni işletmeler için dijitalleşmeyi erişilebilir kılmaktadır. Bu durum, e-ihracatın sadece büyük şirketlerin değil, mikro ve küçük işletmelerin de aktif biçimde yer aldığı bir ticaret modeli olmasını sağlamıştır.

Gelişmekte olan ülkelerde ve KOBİ'ler düzeyinde, e-ihracatın sunduğu fırsatlar kadar riskler de bulunmaktadır. Yüksek dijital dönüşüm maliyetleri, teknik bilgi eksikliği, dijital pazarlama yeterliliği gibi unsurlar KOBİ'lerin küresel dijital pazarda sürdürülebilir rekabet gücü kazanmalarını zorlaştırmaktadır. Aynı zamanda, sınır ötesi e-ticarette karşılaşılan regülasyon farklılıkları, veri güvenliği sorunları, vergi mevzuatı belirsizlikleri ve ödeme sistemlerine erişim gibi engeller de önemli bariyerler oluşturmaktadır (Abou-Shouk vd., 2013; Lendle vd. 2016).

Bir diğer önemli sorun, lojistik ve teslimat süreçlerinde yaşanmaktadır. Özellikle düşük hacimli gönderilerde kargo ücretleri maliyetleri artırmakta, teslimat sürelerinin uzaması müşteri memnuniyetini düşürmektedir (Abou-Shouk vd., 2013). Bunun yanında, internet erişimi ve dijital becerilerdeki eşitsizliklerden kaynaklanan dijital uçurum, e-ihracatın kapsayıcı bir şekilde yaygınlaşmasını sınırlamaktadır. Tüm bu faktörler, e-ihracatın potansiyelini ortaya koyarken, aynı zamanda dijital kapasite inşasının ve uygun politikaların önemini göstermektedir.

4. Küresel Uygulamalardan Örnekler

Günümüzde dijitalleşen ticaret yapısı, ülkelerin ekonomi politikalarında önemli dönüşümlere neden olmuştur. Dijital ekonominin yaygınlaşmasıyla birlikte, ülkeler e-ihracat stratejilerini yeniden şekillendirmekte ve dijital altyapılarını küresel rekabete uyumlu hale getirmeye çalışmaktadır. Avrupa Birliği (AB), bu dönüşümü erken fark eden bölgelerden biri olarak 2015 yılında Dijital Tek Pazar Stratejisi'ni hayata geçirmiştir. Bu strateji ile dijital hizmetlerin sınır ötesi

serbest dolaşımı hedeflenmiş, dijital regülasyonlar uyumlaştırılarak platform temelli ticaretin gelişimi desteklenmiştir (European Commission, 2015; Crémer, de Montjoye ve Schweitzer, 2019). Aynı zamanda Dijital Hizmetler Yasası ve Dijital Piyasalar Yasası gibi uygulamalarla büyük teknoloji firmalarının rekabeti bozucu davranışlarının önüne geçilmesi ve dijital pazarda adil bir ortamın sağlanması amaçlanmıştır (Bertarini, 2023; Martens ve Zscheischler, 2022).

Çin ise dijital ihracat alanında öne çıkan örneklerden biridir. Ülke, özellikle Alibaba, JD.com ve Pinduoduo gibi büyük çaplı dijital platformlar aracılığıyla e-ihracatı hızla yaygınlaştırmış, devlet destekli politikalarla dijital altyapı ve ödeme sistemlerinde önemli gelişmeler kaydetmiştir. “Made in Internet+” ve “Digital Silk Road” gibi programlarla hem iç pazarın dijitalleşmesi sağlanmış hem de sınır ötesi e-ticaret bölgeleri oluşturularak Çinli küçük ve orta ölçekli işletmelerin uluslararası pazarlara entegrasyonu desteklenmiştir. Ayrıca, Çin’in dijital ekosistemi, lojistikten gümrük süreçlerine kadar dijital teknolojilerle entegre edilmiş ve bu sayede ihracat süreci daha verimli hale getirilmiştir (Jiang vd., 2022; Zhang vd., 2023; Hongliang vd., 2024; Zhang vd., 2024; Xu ve Xu, 2023).

Türkiye ise gelişmekte olan bir ülke olarak e-ihracat potansiyelini artırmak adına çeşitli stratejik girişimlerde bulunmuştur. Ticaret Bakanlığı’nın yönlendirmesiyle oluşturulan Kolay İhracat Platformu, e-Turquality destekleri ve dijital danışmanlık hizmetleri, KOBİ’lerin küresel dijital pazarlara erişimini kolaylaştırmayı hedeflemektedir. Ancak mevcut durumda, KOBİ’lerin dijital yetkinlik düzeyinin düşük olması, e-lojistik sistemlerinin sınırlı gelişmişliği ve sınır ötesi ödeme sistemlerine entegrasyonda yaşanan zorluklar, Türkiye’nin dijital ihracat kapasitesini sınırlamaktadır. Türkiye’nin e-ihracat stratejisinin başarılı olabilmesi için dijital altyapının güçlendirilmesi, regülasyonların sadeleştirilmesi ve dijital okuryazarlığın yaygınlaştırılması gerekmektedir (Yılmaz ve Bayram, 2020; İrmak, 2023; Öksüz vd., 2023).

Öte yandan, küresel güney olarak tanımlanan az gelişmiş ve gelişmekte olan ülkelerde dijital ticarete erişim noktasında ciddi yapısal engeller söz konusudur. Bu ülkelerde dijital dışlanma, yalnızca altyapı eksikliklerinden değil, aynı zamanda dijital beceri eksikliklerinden, yüksek dönüşüm maliyetlerinden ve yerel regülasyonların belirsizliğinden kaynaklanmaktadır (Schopp vd., 2019; Heeks, 2022).

Genel olarak değerlendirildiğinde, dijital ticaretin yaygınlaşmasında ülkelerin politika tercihlerinin, altyapı yatırımlarının ve platform temelli ticaret sistemlerine entegrasyonlarının belirleyici olduğu görülmektedir. AB, Çin, Türkiye ve Küresel Güney örnekleri, dijital ihracatın hem fırsatlar sunduğunu hem de ciddi eşitsizlikleri beraberinde getirdiğini göstermektedir. Bu durum, dijital ticaretin sadece teknik değil, aynı zamanda sosyal ve politik bir kalkınma aracı olarak ele alınmasını gerekli kılmaktadır.

SONUÇ ve ÖNERİLER

Dijital teknolojilerin gelişimi, son yıllarda yalnızca üretim süreçlerini değil, aynı zamanda ticaretin doğasını da kökten dönüştürmüştür. Bu bağlamda dijital ekonomi, mal ve hizmet üretiminin, dağıtımının ve tüketiminin dijital teknolojiler aracılığıyla gerçekleştirildiği yeni bir ekonomik yapı olarak ortaya çıkmış; özellikle e-ihracat, bu dönüşümün en somut göstergelerinden biri olmuştur. E-ihracat sayesinde firmalar, geleneksel ticaretin coğrafi, lojistik ve finansal kısıtlarını aşarak küresel pazarlara daha hızlı ve düşük maliyetle erişim imkânı elde etmektedirler. Bu çalışmada, dijital ekonominin uluslararası ticaret üzerindeki etkileri çok boyutlu olarak ele alınmış; e-ihracatın yükselişi, bu alandaki küresel eğilimler ve gelişmekte olan ülkeler özelinde karşılaşılan yapısal zorluklar detaylandırılmıştır.

Değerlendirmeler ve literatür araştırmaları göstermiştir ki, e-ihracat geleneksel ihracata göre daha hızlı büyüyen, daha esnek ve ölçeklenebilir bir yapıya sahiptir. Ancak bu potansiyelin tüm ülkeler ve tüm işletmeler için eşit düzeyde erişilebilir olduğunu söylemek mümkün değildir. Özellikle gelişmekte olan ülkelerde dijital altyapı eksiklikleri, yetersiz dijital beceriler, düşük e-lojistik kapasitesi ve regülasyon belirsizlikleri, dijital ihracatın gelişimini sınırlayan başlıca engeller arasında yer almaktadır.

Çalışmanın en temel bulgularından biri, e-ihracatın sadece teknik bir dönüşüm değil, aynı zamanda sosyoekonomik ve kurumsal kapasite gerektiren çok katmanlı bir süreç olduğudur. Bu noktada, KOBİ’ler gibi sınırlı kaynaklara sahip aktörlerin dijital pazara entegrasyonu hem dijital eşitlik hem de kapsayıcı büyüme açısından kritik öneme sahiptir. Ancak yüksek dijital dönüşüm maliyetleri, yeterli dijital pazarlama stratejilerinin olmaması ve sınır ötesi ticarete karşılaşılan veri güvenliği, gümrük ve vergi uygulamaları gibi sorunlar, bu aktörlerin sürdürülebilir rekabet gücü elde etmelerini zorlaştırmaktadır.

Bu bağlamda politika yapıcılara, özel sektöre ve uluslararası örgütlere yönelik olarak aşağıdaki öneriler sunulmaktadır:

- Dijital altyapının yaygınlaştırılması ve bölgesel dengesizliklerin giderilmesi: Ulusal geniş bant stratejileri, veri merkezleri, 5G altyapısı ve düşük maliyetli dijital hizmet erişimi gibi alanlarda yatırımların artırılması gerekmektedir. Özellikle kırsal bölgelerde dijital dışlanmayı azaltacak sosyal politikalar geliştirilmelidir.
- KOBİ'lere yönelik kapasite geliştirme programlarının yaygınlaştırılması: Dijital beceri eğitimi, e-ihracat danışmanlığı, yazılım lisans destekleri ve finansman erişimi gibi alanlarda çok düzeyli kamu politikaları oluşturulmalıdır. KOBİ'ler için özel e-ihracat hızlandırıcı programlar geliştirilebilir.
- Ticaretin dijital kolaylaştırılması ve e-lojistik entegrasyonu: Akıllı gümrük sistemleri, dijital tedarik zinciri yönetimi ve sınır ötesi veri izleme teknolojilerinin uygulanması, işlem sürelerini ve maliyetleri azaltarak dijital ihracat süreçlerinin etkinliğini artıracaktır.
- Dijital ticaretin regülasyonel uyumunun sağlanması: Çifte vergilendirme, dijital hizmet vergisi, veri akışı kısıtları ve farklı ülkelerdeki dijital kimlik sistemleri gibi konularda uluslararası koordinasyon önem arz etmektedir. WTO, OECD ve UNCTAD gibi yapılar aracılığıyla ortak standartlar oluşturulmalıdır.
- Ülke düzeyinde dijital ihracat stratejilerinin bütüncül şekilde planlanması: Türkiye gibi ülkelerin Dijital Türkiye ve e-ihracat Master Planı gibi belgeleri hayata geçirmesi önemlidir. Bu planlar sadece teknik değil aynı zamanda kurumsal kapasite, insan kaynağı, dijital pazarlama ve küresel iş birliklerini de kapsamalıdır.
- Küresel Güney ülkeleri ve az gelişmiş ekonomiler için özel destek mekanizmalarının geliştirilmesi: Dijital dışlanmanın önlenmesi adına teknoloji transferi, altyapı hibeleri ve bilgi paylaşımı gibi kalkınma temelli yaklaşımlar güçlendirilmelidir.

Genel bir çerçeve ile literatür, dijital ekonominin uluslararası ticaret yapısı üzerindeki etkilerini çok boyutlu bir yaklaşımla değerlendirmiştir. Konu ile ilgili çalışmalardan elde edilen bulgular, dijitalleşmenin yalnızca ticaret hacimlerini artırmakla kalmadığını, aynı zamanda işletmelerin örgütsel yapılarını, liderlik anlayışlarını ve uluslararası rekabet stratejilerini yeniden şekillendirdiğini göstermektedir. Politika önerileri kapsamında, AB'nin Dijital Pazar Yasası küçük ve orta ölçekli işletmelerin korunması açısından önemli dersler sunmaktadır. Benzer şekilde, Çin'in dijital lojistik ağları ve Türkiye'nin KOBİ destek programları, e-ihracatın sürdürülebilir biçimde geliştirilmesi için yol gösterici örneklerdir. Bu bağlamda, altyapı yatırımlarının artırılması ve regülasyonların uyumlaştırılması gerekliliği yanında, örgütsel dönüşüm, insan kaynağı eğitimi ve liderlik kapasitelerinin güçlendirilmesi de kritik öneme sahiptir.

Sonuç olarak, e-ihracat sadece dijital teknolojilerle değil; aynı zamanda güçlü bir kurumsal yapı, uygun regülasyonlar, etkili işbirlikleri ve kapsayıcı kalkınma politikalarıyla desteklendiğinde gerçek anlamda sürdürülebilir bir büyüme ve kalkınma alanı haline gelebilecektir. Bu doğrultuda geliştirilecek çok aktörlü stratejiler, dijital ekonominin sunduğu fırsatlardan daha adil ve dengeli bir biçimde yararlanılmasını mümkün kılacaktır. Çalışma, bu bağlamda yalnızca kuramsal değil; uygulamaya dönük politika üretim sürecine de katkı sağlayabilecek niteliktedir. Çalışmanın bir diğer önemli boyutu, dijital ticareti sadece makroekonomik bir olgu olarak değil, aynı zamanda yönetim ve organizasyon boyutuyla ele almasıdır. Gelecek araştırmalarda, panel veri analizi ve firma düzeyi vaka çalışmalarıyla bu bulguların test edilmesi önerilmektedir.

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The Impact Of Regional Trade Agreements On The Global Economic Integration Process: Opportunities, Risks And New Dynamics

MURAT ALKIN

Abstract: This study examines the role of regional trade agreements in the global economic integration process from a theoretical perspective. In today's increasingly complex globalization era, regional trade agreements, which are increasing in parallel with the multilateral trading system, present both opportunities and risks. The literature review demonstrates that regional trade agreements can create regional competitive advantages by increasing trade volume and foreign direct investment, and can accelerate digitalization and innovation processes. However, there are also risks such as trade diversion, the fragmentation of the global system, and the deepening of asymmetries between developed and developing countries. In recent years, digitalization, the green economy, and geopolitical transformations have made the impact of regional trade agreements on global integration even more pronounced. In this context, the study offers a conceptual framework for regional trade agreements based on the triad of opportunities, risks, and new dynamics, and provides a multidimensional assessment of the future of global economic integration for policymakers and the academic community.

Keywords: Regional Trade Agreements, Global Economic Integration, Opportunities, Risks, Digitalization.

Bölgesel Ticaret Anlaşmalarının Küresel Ekonomik Entegrasyon Sürecine Etkisi: Fırsatlar, Riskler ve Yeni Dinamikler

Özet: Çalışma, bölgesel ticaret anlaşmalarının küresel ekonomik entegrasyon sürecindeki rolünü teorik bir çerçevede incelemektedir. Küreselleşmenin giderek karmaşılaştığı günümüzde, çok taraflı ticaret sistemi ile paralel biçimde artan bölgesel ticaret anlaşmaları hem fırsatlar hem de riskler barındırmaktadır. Literatür incelemesi göstermektedir ki, bölgesel ticaret anlaşmaları ticaret hacmini ve doğrudan yabancı yatırımları artırarak bölgesel rekabet avantajları yaratabilmekte, dijitalleşme ve inovasyon süreçlerini hızlandırabilmektedir. Öte yandan, ticaret sapması, küresel sistemin parçalanması ve gelişmiş-gelişmekte olan ülkeler arasındaki asimetriklerin derinleşmesi gibi riskler de söz konusudur. Son yıllarda dijitalleşme, yeşil ekonomi ve jeopolitik dönüşümler, bölgesel ticaret anlaşmalarının küresel entegrasyon üzerindeki etkilerini daha da belirgin hale getirmiştir. Bu bağlamda çalışma, bölgesel ticaret anlaşmalarının fırsatlar, riskler ve yeni dinamikler üçlüsü üzerinden kavramsal bir çerçeve sunmakta; politika yapıcılar ve akademik çevreler için küresel ekonomik entegrasyonun geleceğine dair çok boyutlu bir değerlendirme ortaya koymaktadır.

Anahtar Kelimeler: Bölgesel Ticaret Anlaşmaları, Küresel Ekonomik Entegrasyon, Fırsatlar, Riskler, Dijitalleşme.

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GİRİŞ

Küresel ekonomik entegrasyon, II. Dünya Savaşı sonrasında oluşturulan çok taraflı ticaret sistemleri aracılığıyla hız kazanmıştır. 1947'de imzalanan Gümrük Tarifeleri ve Ticaret Genel Anlaşması (GATT), tarifelerin düşürülmesi ve serbest ticaretin teşvik edilmesi açısından önemli bir dönüm noktası olmuştur. Daha sonraki süreçte Uruguay Round müzakereleri, hizmetler ve fikri mülkiyet haklarını da kapsayarak entegrasyonun kapsamını genişletmiş; nihayetinde 1995 yılında Dünya Ticaret Örgütü (WTO) kurulmuştur. Bu gelişmeler, küresel ticaretin kurumsal bir çerçevede düzenlenmesini sağlamış ve uluslararası ticaretin serbestleşmesini hızlandırmıştır.

Bununla birlikte, özellikle 1990'lı yıllardan itibaren bölgesel ticaret anlaşmalarında önemli bir artış yaşanmıştır. Avrupa Birliği'nin derinleşen bütünleşmesi, Kuzey Amerika Serbest Ticaret Anlaşması (NAFTA), Asya-Pasifik'te yükselen iş birlikleri ve son dönemde Bölgesel Kapsamlı Ekonomik Ortaklık (RCEP) ile Afrika Kıtasal Serbest Ticaret Alanı (AfCFTA) gibi mega anlaşmalar, bölgesel ticaretin küresel sistemdeki önemini artırmıştır. Bu gelişmeler, küresel ekonomik entegrasyonun yalnızca çok taraflı değil, aynı zamanda bölgesel düzeyde de şekillendiğini göstermektedir.

Bu bağlamda çalışmanın temel araştırma soruları şunlardır:

- Bölgesel ticaret anlaşmaları küresel ekonomik entegrasyonu güçlendiren araçlar mıdır, yoksa küresel ticareti parçalayarak zayıflatan unsurlar mı?
- Bölgesel ticaret anlaşmalarının sunduğu fırsatlar ve barındırdığı riskler nasıl dengelenebilir?
- Dijitalleşme, yeşil ekonomi ve jeopolitik gelişmeler gibi yeni küresel dinamikler, bölgesel ticaret anlaşmalarının yapısını ve küresel entegrasyona katkısını nasıl dönüştürmektedir?

Bu sorular çerçevesinde çalışma, bölgesel ticaret anlaşmalarının küresel entegrasyon sürecine etkilerini tarihsel bir perspektif içinde tartışmayı, fırsatlar ve riskler boyutunu değerlendirmeyi ve geleceğe yönelik yeni dinamikleri kavramsal olarak irdelemeyi amaçlamaktadır.

1. Kavramsal Çerçeve

Bölgesel ticaret anlaşmalarının küresel ekonomik entegrasyon üzerindeki etkileri uzun süredir akademik tartışmaların merkezinde yer almaktadır. Bu tartışmaların temeli, Jacob Viner'in (1950) ortaya koyduğu ticaret yaratma (trade creation) ve ticaret saptırma (trade diversion) kavramlarına dayanmaktadır. Viner'e göre bölgesel ticaret anlaşmaları, bir yandan üye ülkeler arasında ticaret maliyetlerini düşürerek daha verimli üretim yapan ülkelerin pazar payını artırabilmekte; öte yandan üye olmayan ülkeler aleyhine ticaret sapmasına yol açarak küresel refah kayıplarına neden olabilmektedir (Viner, 1950).

Bu tartışmayı derinleştiren bir diğer önemli yaklaşım Bhagwati'ye (1995) aittir. Bhagwati, "küreselleşme mi, bölgeselleşme mi?" sorusunu gündeme getirerek, bölgesel anlaşmaların çok taraflı ticaret sistemi üzerindeki rolünü tartışmıştır. Ona göre, bazı koşullarda bölgesel anlaşmalar küreselleşmenin "basamak taşları" (stepping stones) olabilirken, bazı durumlarda "engel taşları" (stumbling blocks) işlevi görerek küresel ticareti parçalayabilir (Bhagwati, 1995).

Literatürde iki ana yaklaşım öne çıkmaktadır. Destekleyici görüşe göre, bölgesel ticaret anlaşmaları ticaret akışlarını artırmakta, doğrudan yabancı yatırımları teşvik etmekte ve üye ülkeler arasında ekonomik yakınlaşmayı hızlandırmaktadır (Frankel vd., 1997). Bu bakış açısı, bölgesel anlaşmaların özellikle gelişmekte olan ülkelerin küresel değer zincirlerine entegrasyonunu kolaylaştırdığını savunmaktadır. Eleştirel görüş ise, bölgesel ticaret anlaşmalarının çok taraflı ticaret sistemini parçalayarak WTO'nun kurumsal rolünü zayıflattığını, böylece küresel ekonomik düzenin bütünlüğünü tehdit ettiğini ileri sürmektedir (Panagariya, 2000).

Güncel literatür ise bölgesel ticaret anlaşmalarının etkilerini mega-bölgesel girişimler ve yeni tematik alanlar üzerinden tartışmaktadır. Örneğin, 2020 yılında imzalanan Bölgesel Kapsamlı Ekonomik Ortaklık (RCEP), dünyanın en büyük serbest ticaret bloklarından biri olarak Asya-Pasifik merkezli küresel ticaret yapısını güçlendirmiştir (Petri ve Plummer, 2020). Benzer şekilde, Afrika Kıtasal Serbest Ticaret Alanı (AfCFTA), Afrika ülkelerinin küresel ticaret sistemine entegrasyonunda dönüştürücü bir potansiyele sahiptir (Songwe, 2019). Bunun yanında, son yıllarda dijital ticaret anlaşmaları da literatürde yükselen bir konu haline gelmiştir. Digital Economy Partnership Agreement (DEPA), dijital hizmetler, veri akışları ve e-ticaret alanında yeni bir çerçeve sunarak bölgesel ticaret anlaşmalarının kapsamını genişletmektedir (Aaronson, 2021).

Dolayısıyla, literatürde genel bir uzlaşma olmamakla birlikte, bölgesel ticaret anlaşmalarının küresel entegrasyon üzerindeki etkilerinin bağlama ve anlaşmaların kapsamına göre değiştiği görülmektedir.

2. Fırsatlar

Bölgesel ticaret anlaşmalarının en önemli fırsatlarından biri, ticaret yaratma etkisiyle üye ülkeler arasındaki ticaret hacmini artırmasıdır. Viner'in (1950) ortaya koyduğu gibi, bölgesel entegrasyon verimli üreticilerin pazarda daha fazla yer bulmasını sağlayarak ekonomik refahı yükseltebilir. Nitekim Frankel vd. (1997), bölgesel ticaret anlaşmalarının hem ticaret akışlarını artırdığını hem de dışsal yatırımlar için cazibe oluşturduğunu vurgulamaktadır. Bu bağlamda, doğrudan yabancı yatırımların (FDI) artışı, bölgesel blokların en önemli kazanımlarından biri olarak değerlendirilmektedir (World Bank, 2020).

İkinci olarak, bölgesel ticaret anlaşmaları küçük ve orta ölçekli işletmeler (KOBİ) için yeni pazar fırsatları yaratmaktadır. Özellikle ticaret engellerinin kaldırılması, lojistik ve gümrük süreçlerinin uyumlaştırılması, KOBİ'lerin uluslararası pazarlara erişimini kolaylaştırmaktadır (WTO, 2016). ASEAN ve AB örneklerinde görüldüğü üzere, bölgesel bütünleşmeler KOBİ'lerin ihracat kapasitelerini artırmakta ve küresel değer zincirlerine katılımlarını teşvik etmektedir (OECD, 2019).

Üçüncü olarak, bölgesel ticaret anlaşmaları bölgesel rekabet avantajı sağlamaktadır. Krugman'ın (1991) yeni ticaret teorisi perspektifinden bakıldığında, ekonomik bütünleşme ölçek ekonomileri ve uzmanlaşmayı artırarak üye ülkeler için küresel pazarda rekabet gücünü yükseltmektedir. RCEP gibi mega anlaşmalar, Asya-Pasifik ülkelerine küresel tedarik zincirlerinde stratejik avantaj kazandırmıştır (Petri ve Plummer, 2020).

Dördüncü fırsat, teknoloji transferi, inovasyon ve dijitalleşmenin hızlanmasıdır. Bölgesel iş birlikleri, teknoloji yoğun sektörlerde ortak Ar-Ge faaliyetlerini teşvik etmekte ve dijital altyapının geliştirilmesine zemin hazırlamaktadır. AfCFTA'nın dijital ticaret stratejisi, Afrika'da dijitalleşme sürecini hızlandırmayı hedeflemektedir (Songwe, 2019). Ayrıca, DEPA gibi dijital ekonomi anlaşmaları, veri akışlarının serbestliği ve e-ticaretin kolaylaştırılması yoluyla inovasyonu desteklemektedir (Aaronson, 2021).

Son olarak, bölgesel ticaret anlaşmaları kültürel ve kurumsal yakınlaşmayı da beraberinde getirmektedir. Üye ülkeler arasında standartların uyumlaştırılması, kurumsal iş birliği mekanizmalarının güçlendirilmesi ve kültürel etkileşimlerin artması, uzun vadeli bölgesel bütünleşmeye katkı sağlamaktadır (Mattli, 1999). Bu süreç, ekonomik entegrasyonun yalnızca ticaret ve yatırım boyutunda değil, aynı zamanda sosyal ve kurumsal boyutlarda da ilerlemesini mümkün kılmaktadır.

3. Riskler

Bölgesel ticaret anlaşmalarının küresel ekonomik entegrasyona katkıları tartışılırken, bu anlaşmaların barındırdığı riskler de göz ardı edilmemelidir. İlk olarak, ticaret sapması (trade diversion) ve küresel verimlilik kaybı önemli bir risktir. Viner'in (1950) belirttiği üzere, bölgesel ticaret anlaşmaları verimsiz üreticilerin korunmasına yol açarak küresel düzeyde kaynak dağılımında etkinliği bozabilir. Bu durum, ticaret yaratma etkisinin aksine, toplam refahı azaltabilmektedir (Panagariya, 2000).

İkinci olarak, bölgesel ticaret anlaşmalarının artışı, Dünya Ticaret Örgütü'nün otoritesinin azalmasına ve küresel ticaret sisteminin parçalanmasına yol açabilmektedir. Bhagwati (1995), bu olguyu “çok taraflı sistemin erozyonu” olarak tanımlamış ve bölgesel anlaşmaların WTO'yu zayıflatan bir “engel taşı” işlevi görebileceğini savunmuştur. Baldwin (2011) de bölgeselcilik dalgasının, küresel düzeyde çok taraflı serbest ticaret müzakerelerini ikincil hale getirdiğini vurgulamaktadır.

Üçüncü olarak, bölgesel ticaret anlaşmaları gelişmiş ve gelişmekte olan ülkeler arasındaki asimetrleri derinleştirme riski taşımaktadır. Gelişmiş ülkeler, güçlü müzakere kapasiteleri sayesinde avantajlı koşullar elde ederken, gelişmekte olan ülkeler çoğu zaman bu süreçte daha kırılgan bir pozisyonda kalmaktadır (Whalley, 2008). Bu durum, bölgesel entegrasyonun kapsayıcılığını zayıflatır ve küresel eşitsizlikleri artırabilir.

Dördüncü olarak, bölgesel ticaret anlaşmaları küçük ülkelerin büyük ekonomilere bağımlılığını artırabilmektedir. Özellikle tek pazara yüksek oranda bağımlı olan küçük ekonomiler, bölgesel blok içerisindeki karar alma süreçlerinde daha az etkili olmakta ve büyük ekonomilerin politikaları karşısında kırılgan hale gelmektedir (Schiff ve Winters, 2003).

Son olarak, bölgesel ticaret anlaşmalarının jeopolitik bağlamda politik riskleri bulunmaktadır. Bölgesel bloklaşma, küresel ekonomide kutuplaşmaya yol açabilir; korumacı eğilimler, ticaret savaşlarını tetikleyebilir. ABD-Çin arasındaki ticaret gerilimleri ve Brexit süreci, bölgeselcilik ile jeopolitik dinamiklerin nasıl iç içe geçtiğini göstermektedir (Evenett ve Fritz, 2019). Bu bağlamda, bölgesel anlaşmaların yalnızca ekonomik değil, aynı zamanda politik sonuçlar doğurabileceği unutulmamalıdır.

4. Yeni Dinamikler

Bölgesel ticaret anlaşmalarının küresel entegrasyon üzerindeki etkileri, son yıllarda ortaya çıkan yeni küresel dinamikler çerçevesinde yeniden şekillenmektedir. Bu dinamikler, yalnızca ticaretin yapısını değil, aynı zamanda anlaşmaların kapsamını ve derinliğini de dönüştürmektedir.

- Dijitalleşme

Dijitalleşme, bölgesel ticaret anlaşmalarının en belirgin yeni dinamiklerinden biridir. E-ticaret, dijital hizmetler ve veri akışlarının artışı, anlaşmalara dijital ticaret bölümleri eklenmesini gerekli kılmıştır. Örneğin, Digital Economy Partnership Agreement (DEPA), sınır ötesi veri akışlarının serbestliği, dijital güvenlik standartları ve e-ticaretin kolaylaştırılması açısından öncü bir düzenleme olarak öne çıkmaktadır (Aaronson, 2021). Benzer şekilde, Asya-Pasifik bölgesinde imzalanan Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), dijital ekonomi hükümleriyle ticaretin yapısal dönüşümünü desteklemektedir (Monteiro ve Teh, 2017).

- Yeşil Ekonomi ve Sürdürülebilirlik

Bölgesel ticaret anlaşmalarının bir diğer yeni dinamiği, yeşil ekonomi ve sürdürülebilirlik konularıdır. Avrupa Birliği'nin Yeşil Mutabakatı ve karbon sınır düzenleme mekanizması, ticaret anlaşmalarında çevresel standartların yükseltilmesini teşvik etmektedir (European Commission, 2021). Bu çerçevede, çevresel yükümlülüklerin anlaşmalara dahil edilmesi, sadece ticaret akışlarını değil, aynı zamanda üretim süreçlerini de dönüştürmektedir. Hufbauer, Yee ve Zhang (2020), yeşil ekonomi kriterlerinin giderek daha fazla bölgesel ticaret anlaşmasının parçası haline geldiğini vurgulamaktadır.

- Jeopolitik Faktörler

Son dönemde jeopolitik gelişmeler, bölgesel ticaret anlaşmalarının tasarımını ve uygulanmasını doğrudan etkilemektedir. ABD-Çin ticaret savaşı, RCEP'in hızla tamamlanmasına zemin hazırlamış; Brexit ise Avrupa Birliği'nin dış ticaret politikalarında yeniden yapılanmaya yol açmıştır (Evenett ve Fritz, 2019). Ayrıca, Rusya-Ukrayna savaşı, enerji güvenliği ve gıda tedarik zincirleri bağlamında bölgesel iş birliğinin önemini artırmıştır (World Bank, 2022). Bu gelişmeler, bölgesel ticaret anlaşmalarının sadece ekonomik değil, aynı zamanda stratejik bir araç olarak da görülmesine neden olmaktadır.

- Çok Katmanlı Entegrasyon

Bölgesel ticaret anlaşmalarının yeni dinamiklerinden bir diğeri, çok katmanlı entegrasyon eğilimidir. Geleneksel gümrük tarifelerinin ötesine geçen anlaşmalar, hizmet ticareti, fikri mülkiyet, yatırım koruması, dijital ticaret ve çevresel düzenlemeleri kapsayacak şekilde genişlemektedir (Baldwin, 2016). Bu eğilim, anlaşmaların küresel değer zincirleri üzerindeki etkisini artırmakta ve entegrasyonu derinleştirmektedir.

5. Tartışma

Bölgesel ticaret anlaşmaları üzerine literatür, bu anlaşmaların küresel ekonomik entegrasyon sürecinde ikili bir doğaya sahip olduğunu göstermektedir. Bir yandan ticaret yaratma, yatırım akışlarını artırma, inovasyonu teşvik etme gibi olumlu etkiler öne çıkarken; diğer yandan ticaret sapması, çok taraflı sistemin zayıflaması ve ülkeler arası eşitsizliklerin artması gibi riskler gündeme gelmektedir (Viner, 1950; Bhagwati, 1995). Bu durum, bölgesel ticaret anlaşmalarının küresel entegrasyon için hem bir “basamak taşı” hem de potansiyel bir “engel taşı” işlevi görebileceğini ortaya koymaktadır.

Destekleyici yaklaşım, bölgesel ticaret anlaşmalarının küresel serbestleşmeye giden yolda tamamlayıcı bir rol oynadığını ileri sürmektedir. Frankel, Stein ve Wei (1997), bölgesel blokların ticaret akışlarını artırarak küresel ticaret sistemine katkıda bulunduğunu belirtmiştir. Özellikle gelişmekte olan ülkeler için bu anlaşmalar, küresel değer zincirlerine entegrasyon açısından stratejik fırsatlar sunmaktadır (World Bank, 2020). Eleştirel yaklaşım ise, bu anlaşmaların küresel sistemi parçaladığını ve WTO'nun etkinliğini azalttığını savunmaktadır (Baldwin, 2011; Panagariya, 2000). Bhagwati (1995), bu çelişkiyi “bölgeselcilik mi küreselcilik mi?” sorusu ile kavramsallaştırmıştır.

Güncel vaka örnekleri, bu tartışmanın pratikte de görüldüğünü göstermektedir. RCEP, Asya-Pasifik bölgesinde dünyanın en büyük ticaret bloklarından birini oluşturarak bölgesel entegrasyonu hızlandırmıştır (Petri ve Plummer, 2020). Afrika Kıtasa Serbest Ticaret Alanı (AfCFTA), kıtanın parçalı ekonomik yapısını bütünleştirme potansiyeline sahiptir; ancak altyapı ve kurumsal kapasite eksiklikleri nedeniyle başarı şansı tartışmalıdır (Songwe, 2019). USMCA (eski NAFTA) ise Kuzey Amerika’da entegrasyonu yeniden düzenlemiş, özellikle işgücü ve çevre standartlarını öne çıkararak yeni bir model sunmuştur (Villareal ve Fergusson, 2020). Avrupa Birliği örneği ise, bölgesel entegrasyonun en ileri düzeyine işaret etmekte; ancak dışlayıcı yapısıyla üçüncü ülkeler için ticaret engeli oluşturabilmektedir (Mattli, 1999).

Dijitalleşme, yeşil ekonomi ve jeopolitik faktörler, bu tartışmayı daha da karmaşık hale getirmektedir. Dijital ticaret anlaşmaları, bölgesel entegrasyonun yeni alanlara kaydığını gösterirken (Aaronson, 2021), yeşil mutabakatlar ve karbon düzenlemeleri ticaretin sadece ekonomik değil, aynı zamanda çevresel standartlara bağlı olarak yeniden şekillendiğini ortaya koymaktadır (European Commission, 2021). Jeopolitik gelişmeler ise (örneğin ABD-Çin ticaret savaşı, Brexit ve Rusya-Ukrayna savaşı) bölgesel ticaret anlaşmalarını sadece ekonomik değil, aynı zamanda stratejik araçlara dönüştürmektedir (Evenett ve Fritz, 2019; World Bank, 2022).

Dolayısıyla, literatür ve güncel gelişmeler ışığında, bölgesel ticaret anlaşmalarının küresel entegrasyona katkısı bağlama, kapsam ve uygulama biçimine bağlıdır. Fırsat ve risklerin dengelenmesi, bu anlaşmaların gelecekteki yönünü belirleyecek en kritik unsur olarak öne çıkmaktadır.

SONUÇ VE ÖNERİLER

Çalışma, bölgesel ticaret anlaşmalarının küresel ekonomik entegrasyon sürecine etkilerini teorik bir çerçevede incelemiş ve literatürdeki farklı yaklaşımları değerlendirmiştir. Bulgular göstermektedir ki, bölgesel ticaret anlaşmaları hem fırsatlar hem de riskler barındıran çifte karakterli bir yapıya sahiptir. Bir yandan ticaret yaratma, doğrudan yabancı yatırımları teşvik etme, KOBİ’lerin küresel değer zincirlerine katılımını kolaylaştırma ve dijitalleşmeyi hızlandırma gibi avantajlar sunarken (Frankel vd., 1997; OECD, 2019), diğer yandan ticaret sapması, çok taraflı sistemin zayıflaması ve gelişmiş–gelişmekte olan ülkeler arasındaki asimetritelerin artması gibi olumsuz sonuçlar da doğurabilmektedir (Viner, 1950; Panagariya, 2000; Bhagwati, 1995).

Son yıllarda dijitalleşme, yeşil ekonomi ve jeopolitik gelişmeler, bölgesel ticaret anlaşmalarının niteliğini köklü biçimde dönüştürmüştür. DEPA gibi dijital ticaret anlaşmaları veri akışlarının serbestliğini gündeme getirirken (Aaronson, 2021), Avrupa Birliği’nin Yeşil Mutabakatı karbon düzenlemelerini ticaret politikalarının merkezine yerleştirmiştir (European Commission, 2021). Jeopolitik gelişmeler ise (ABD-Çin ticaret savaşı, Brexit, Rusya-Ukrayna savaşı) bölgesel ticaret anlaşmalarını yalnızca ekonomik değil, aynı zamanda stratejik bir araç haline getirmiştir (Evenett ve Fritz, 2019; World Bank, 2022).

- Teorik Katkı

Bu çalışma, literatüre “fırsatlar–riskler–yeni dinamikler” üçlü çerçevesi üzerinden kavramsal bir katkı sunmaktadır. Böylelikle, bölgesel ticaret anlaşmalarının küresel entegrasyona katkısı yalnızca ekonomik sonuçlar bağlamında değil, aynı zamanda kurumsal, teknolojik ve jeopolitik boyutlarıyla değerlendirilmiştir.

- Politika Önerileri

- WTO ile uyum: Bölgesel ticaret anlaşmaları, çok taraflı sistemle uyumlu hale getirilmeli ve WTO’nun kurumsal otoritesini destekleyecek mekanizmalar geliştirilmelidir (Baldwin, 2011).
- KOBİ ve gelişmekte olan ülkeler: Bu aktörlerin küresel entegrasyondan daha fazla fayda sağlaması için kapasite geliştirme programları, dijital altyapı yatırımları ve finansal destek mekanizmaları artırılmalıdır (WTO, 2016; World Bank, 2020).
- Dijitalleşme entegrasyonu: Bölgesel ticaret anlaşmalarına dijital ekonomi unsurları entegre edilmeli, veri güvenliği, sınır ötesi dijital hizmetler ve e-ticaret düzenlemeleri standardize edilmelidir (Monteiro ve Teh, 2017).
- Yeşil ekonomi uyumu: Anlaşmalar, karbon düzenlemeleri ve çevre standartlarını içerecek şekilde güncellenmeli, sürdürülebilir üretim ve ticaret desteklenmelidir (Hufbauer, Yee ve Zhang, 2020).
- Jeopolitik denge: Bölgesel bloklaşmaların küresel parçalanmaya yol açmaması için çok taraflı diyalog ve iş birliği mekanizmaları güçlendirilmelidir.

Gelecek Araştırmalar

Bu çalışma teorik bir çerçeve sunmakla birlikte, gelecekte yapılacak ampirik araştırmalar bölgesel ticaret anlaşmalarının etkilerini daha somut biçimde ortaya koyabilir. Özellikle:

- Panel veri analizleriyle RCEP, AfCFTA, USMCA gibi anlaşmaların ticaret, yatırım ve inovasyon üzerindeki etkileri ölçülebilir.
- Firma düzeyi vaka çalışmaları, bölgesel anlaşmaların KOBİ'ler ve büyük şirketler üzerindeki farklı sonuçlarını gösterebilir.
- Sektörel karşılaştırmalar (örneğin dijital hizmetler, enerji, tarım) bölgesel entegrasyonun farklı alanlardaki yansımalarını ortaya koyabilir.

Sonuç olarak, bölgesel ticaret anlaşmaları küresel ekonomik entegrasyonun geleceğini belirleyen kritik araçlardan biridir. Ancak bu anlaşmaların fırsatlarının maksimize edilmesi ve risklerinin minimize edilmesi, hem çok taraflı sistemin güçlendirilmesine hem de yeni küresel dinamiklere uyum sağlayacak esnek politika tasarımlarına bağlıdır.

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Heidegger's Criticism of Aristotle's Logic: The Ontological Inquiry of the Principles of Reason

AYŞE ACARER*¹

Abstract: This study takes issue with Heidegger's comprehensive critique of Aristotle's logic and the way he questions the ontological foundations of the principles of reason. The study questions the historical background of the four classical principles. These principles are identity, non-contradiction, the principle of excluded middle, and Leibniz's principle of sufficient reason. It is accepted that the line extending from Aristotle to Husserl consolidates logic as a formal-universal truth ground. Heidegger, on the other hand, claims that the "question of being" is ignored; logic is based on a metaphysical acceptance focused on what exists. In the criticism of the principle of identity, it is stated that the formula " $A = A$ " glorifies identity as a static essence, whereas Dasein's temporal worldly experience offers a dynamic "way of being the same" that always renews identity. It is shown that the principle of non-contradiction forces the phenomenological tensions of being into singular identities; the principle of excluded middle excludes the phenomena of the intermediate field; and the principle of sufficient reason forces the questionability of being into a causal perspective, covering up the hermeneutic plurality of meaning. Heidegger's objection to these four principles stems from his redefinition of the original task of logos as "aletheia," the event of revelation. Truth is not conformity or formal correctness as Aristotle's logic suggests; it is a dimension of experience that emerges in the cycle of latency and openness of being. Thus, logic should not reduce the experience of being; it should take into account Dasein's modality of being in the world. This study examines the contemporary effects of Heideggerian criticism. In Gadamer's hermeneutics, the tradition-history line is suggested instead of the universality of logos. Derrida and Deleuze develop difference-centered thoughts by breaking the principles of identity and non-contradiction from a post-structuralist perspective. In the analytical tradition, Hintikka, Dummett and Brandom present models that question classical principles. The common point of these expansions is to historicize the principles of logic by removing them from fixed axioms and to re-functionalize them in a practical linguistic context. On the other hand, Heidegger's critique is also subject to accusations of irrationalism. It is claimed that the risk of weakening the formal scientific control of logic can legitimize arbitrary decisions in the political arena; Heidegger's attitudes during his rectorship exemplify this danger. Taking this tension into account, the study argues that logic should neither be seen as a complete instrumentality nor as an absolute discipline of truth. On the contrary, it is adopted that remaining in a productive tension between phenomenological hermeneutics and formal analysis will keep thought alive.

Keywords: Logic, Criticism, The Principles Of Reason, Heidegger, Aristotle.

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1. INTRODUCTION

Aristotelian logic constitutes the conceptual center of a broad continuum extending from Aristotle to Leibniz and from there to modern scientific method studies. The principles of Aristotle's logic, namely, identity, non-contradiction, the principle of excluded middle, and sufficient reason, are considered as immutable axioms that guarantee the formal consistency of thought and the validity of argumentation (Lear, 1980). However, at the beginning of the twentieth century, Heidegger conceptualized the "question of being" as an implicit acceptance of Aristotle's logic and brought the ontological status of these principles into question (Heidegger, 1927/1962). At this point, the history of logic seems to have followed an epistemic and methodological course. Heidegger, on the other hand, argued that logic itself was historicized as an ontic phenomenon, but that it was done by concealing being itself (Dahlstrom, 2001).

Heidegger develops his critique of the fundamental principles of reason on which Aristotle's logic is based -identity, non-contradiction and the principle of excluded middle- as part of his radical questioning of the originary tendencies of Western metaphysics. According to Heidegger, these principles are not only logical rules, but also ontological assumptions that determine how being (Sein) is understood and comprehended. Western thought, especially since Aristotle, has always thought of being in terms of "beings" (Seiendes), and this way of thinking has become evident in the formal structure of Aristotle's logic.

In his fundamental work *Being and Time*, Heidegger argues that logic is not merely a tool for thinking, but rather is shaped as a result of a certain understanding of being. In this context, the rational principles of Aristotle's logic reduce the direction of thinking to the level of representation and calculation, removing it from being itself. According to Heidegger, although logic, especially traditional logic based on Aristotle's formal categories, is sufficient to grasp "what is," it is insufficient to reveal the truth of "being" (Heidegger, 1962).

The principle of identity ($A = A$), which is at the center of this criticism, means the narrowing of the understanding of being in Heidegger's thought. According to him, this principle is based on the assumption that things are in themselves and unchangeable. However, being is not static for Heidegger, but a dynamic and historical expansion. Therefore, the idea of identity conceals the truth of being. In his work *Identity and Difference*, Heidegger argues that understanding identity only as similarity or equality is insufficient. True identity should be thought in the unity of the different. Heidegger explains this with the expression "identity as a belonging-together of difference" (Heidegger, 2002). This approach highlights a deeper way of thinking that cannot be reduced to the identity principle of Aristotle's logic.

Similarly, the principle of non-contradiction is also problematized by Heidegger (Anderson, 1993). This principle, defined by Aristotle as the "strongest principle," is based on the assumption that something cannot be both itself and its opposite at the same time. However, according to Heidegger, being is not a fixed structure determined by sharp boundaries, but an event that is open to multiple meanings and expansion. In his work *Introduction to Metaphysics*, he argues that contradiction is not just a logical error, but an expression of the multiple and implicit nature of being (Heidegger, 2014). Thus, contradiction is not a deviation that thought must limit, but perhaps one of the deepest experiences of being.

The principle of the principle of excluded middle (*tertium non datur*) shows that Aristotle's logic works through binary oppositions. A proposition is either true or false; there is no third option. However, in Heidegger's thought, truth is beyond this binary logic. Truth, which he defines through the concept of *aletheia* (unconcealment), is understood as the process of being revealing itself. This process is always incomplete, always works with a "veil". Therefore, truth cannot be reduced to the Aristotle's logic's understanding of truth (correspondence) (Heidegger, 1962). Being is always an incomplete, historical, and horizon-opening experience.

Heidegger's criticisms are not limited to technical logical structures; his aim is to redefine the nature of thinking. The modern world's way of thinking is limited to calculative thinking. This way of thinking grasps things through their instrumental values and relates existence only to what is "usable." Heidegger defines this way of thinking in his work *The Question Concerning Technology* as a "framing" (*Gestell*) determined by technical thinking (Heidegger, 1977). According to him, the principles of logic are also part of this framework: it prefers the limited, fixed and predictable, and ignores the event nature and expansion of existence.

Heidegger does not completely reject the principles of Aristotle's logic; however, he criticizes the acceptance of these principles as the basis of philosophical thinking. According to him, thinking requires questioning existence before explaining what exists. This necessitates a way of thinking that goes beyond logic, namely meditative thinking. This thinking is nourished not by conceptual closures, but by the thought of openness, silence, and the latent.

This study aims to examine the criticism in question in its historical, conceptual and problematic dimensions. Logic, which is based on the "organon" in the Aristotelian-Thomist tradition, presents an institutionalized formal order together with Kant's transcendental scheme and Hegel's dialectical synthesis (Kant, 2024; Hegel, 1874). Husserl's "pure logic" initiative opened the problem to discussion on a primary basis with the claim of "ideal forms purified from all psychological content" (Husserl, 2002). Heidegger, on the other hand, radicalized phenomenological hermeneutics and positioned logic as a secondary phase of the thought of being.

In this context, the questions sought to be answered throughout the study are as follows: (1) In what position are the principles of reason situated historically-ontologically? (2) With what arguments did Heidegger problematize these principles? (3) What are the current philosophical, scientific and political reflections of criticism?

2. Tractatus Principles of Reason and Historical Background

The The origin of Aristotle's logic is based on Aristotle's *Organon*, and the discussions are carried out particularly in the context of the topics covered in the *Organon*. In these texts, compiled under the titles of *Categories*, *On Interpretation*, *Prior Analytics*, *Posterior Analytics*, *Topics* and *Sophistic Refutations*, term logic, on the one hand, grounded ontological classifications, and on the other hand, determined the forms of validity of arguments (Aristotle, 1995). Medieval scholastics -especially Aquinas- reworked this legacy within the framework of the "ratio-fidei" dialectic. Thus, logic was accepted as a functional method in formulating truth (Aquinas, 2014).

In Aristotle's *Metaphysics*, the principle of non-contradiction is called the "strongest principle" and is presented as the fundamental condition on which all sciences are based (Aristotle, 1984). This statement clearly shows that the principle of non-contradiction is not only an intellectual principle, but is based on an ontological necessity. In other words, the principle that something cannot be both itself and its opposite at the same time is presented as a principle related to the nature of what exists, not thought. Therefore, in Aristotle's logic, the principles of reason do not point to the conceptual representation of what exists, but to the necessities directly related to existence itself.

The principle of identity, although not explicitly formulated in Aristotle, forms the basis of his categorical thought and understanding of definition. An entity is identical with itself, and this identity is thought through its essence (*ousia*), which

determines what it is. Therefore, identity is not only a logical principle of truth, but also an ontological assumption that guarantees the continuity and definability of the essential in time (Owen, 1960; Loux, Loux, 2008).

In the modern era, Descartes' methodological doubt and Leibniz's ideal of calculus ratiocinator founded the claim of universal knowledge based on formal certainty (Leibniz, 1686/1989). While explaining synthetic a priori judgments, Kant positioned transcendental logic as the verification of the necessary conditions of experience (Kant, 2024). Hegel identified logic with the dialectics of Geist, which moves in itself, and emphasized "positive-negative" dynamism. Thus, the principle of identity was dialectically transformed by inherent contradiction (Hegel, 1874). Husserl defended the reality of formal science with his critique of psychologism in "pure logic" (Husserl, 2002).

The common denominator derived from this historical line is formed by the belief that logic guarantees the ground of truth "independent of form and content". However, this very point reveals the starting threshold of Heideggerian criticism. Because according to this perspective, the question of being is ignored and the categories of being are absolutized (Polt, 1999).

Aristotle's categories should also be evaluated in this context. While the categories organize the modes of existence that can be said, they are based on the assumption that these existences are located in a fixed, definable and hierarchically structured universe. This structure makes the principles of logic work not only as mental operations but also as structural representations of reality (Smith, 1997). Therefore, in Aristotle's logic, the principles of reason are directly related to the idea of ontological fixity, essentiality and determinism.

The four principles of Aristotle's logic function as fundamental axioms in the logical consciousness of the Aristotelian tradition. The principle of identity, with the formula " $A=A$ ", registers that everything is the same as itself; the principle of non-contradiction, the norm " A and $\neg A$ cannot be true at the same time"; the principle of excluded middle, the rule " A or $\neg A$ is necessarily true"; the principle of sufficient reason, added by Leibniz, registers the thesis that "every event has a sufficient reason" (Rescher, 2014). These principles ensure the formal validity of logical inferences and are also accepted as the guarantee of metaphysical-theological and scientific argumentation (Hintikka, 2013).

However, principles also constitute an "episteme dispositif" that limits the orientation of thought towards being. More clearly, identity legitimizes the forcing of multiplicity and difference into a singular identity mold. Non-contradiction ignores the tense, paradoxical dimensions of the experience of being. the principle of excluded middle imposes an "either/or" determinism that confines the phenomena of the intermediate field to a dichotomous scheme. Finally, sufficient reason eliminates hermeneutic plurality by limiting being to a causal chain of explanation (Derrida, 2016; Deleuze, 1968/1994).

3. Heidegger's Ontological Critique of the Principles of Reason

Heidegger claims that he equates logic with "logos" in the Aristotelian tradition, but that the original meaning of "logos" corresponds to the verb *legein* – to reveal. Therefore, Heidegger states that he grounds truth as "aletheia", the event of revealing (Heidegger, 1977). In this context, Aristotle's logic represents a historical phase of logos. However, this view means ignoring the connection that logos establishes with the investigation of being.

The principle of identity finds its equivalent in the meaning of the way of being the same (*Gleichursprünglichkeit*) instead of "sameness" in Heidegger's readings. From this perspective, identity is not a pre-given identity, but a modality of "togetherness" that is renewed each time in *Dasein's* world (Heidegger, 1993). Therefore, identity reflects not the categorical bond between ontic entities, but the horizon of *Dasein's* temporal and structural expansions. Thus, when fixed with the classical formula, the ongoing movement of differentiation of being acquires a certain implicit quality (Derrida, 2016; Altunya & Acarer, 2023).

While the principle of non-contradiction is in the position of "the strictest principle of metaphysics" in Aristotle, Heidegger resolves this rigidity with the tension of *Dasein's* presence-in-the-world. According to Heidegger, the phenomenological appearance of beings should be accepted not as a single fixed collection of identities, but as "multiple meanings" (*pollachos legomena*) that present themselves in different modes at every moment (Heidegger, 1993). Therefore, the inability to think of " A and $\neg A$ " at the same time actually appears as an abstraction that completely excludes the temporally-differentiating structure of being (Crowell, 2001).

The principle of excluded middle gains meaning as a principle that reinforces the desire for certainty of New Age rationalism. Heidegger suspends this principle by including the tension of "being-nothingness" in the problem. Because, according to him, nothingness should be understood as a primary accompanying element in the ontology of being. In this respect, the intermediate "nothingness" can be experienced in the complex structure of *Dasein* (Heidegger, 1993). Thus, the necessity of " A or $\neg A$ " is a technique that ignores the oscillation of being between "what-is" and "what-is-not".

The principle of sufficient reason was considered as the *logos* of the “ultimate explanation” in Leibniz and fed the causal determinism of modern science. Heidegger finds the originary phenomenon of the act of questioning in the structure of understanding of *Dasein*. When the causal chain is prioritized over the horizon of understanding, the question “why?” loses its ontological meaning to a great extent. Thus, the questioning in question became a purely technical-instrumental function (Polt, 1999). For this reason, a thinking model dominated by the principle of sufficient reason reduced being itself to a “calculable object” and *Dasein* to the concept of “existing material” (*Bestand*) (Heidegger, 1993).

At this point, Heidegger’s assessment is explanatory. According to Heidegger, Aristotle’s logic has caused thinking to lose its essential quality of investigating being and become a technical process that classifies what exists. This transformation has transformed the principles of logic not only as formal norms, but also as historical-ontological rules that serve to comprehend being through the categories of “representability” and “presence” (Heidegger, 1962; Heidegger, 1993). Thus, the principles of Aristotle’s logic are positioned as one of the starting points of the forgetfulness of being in Western metaphysics.

In this context, in Aristotle, the principles of reason are not only structures that establish the order of thought, but also historical-ontological moments that determine how being is understood, what is assumed and what is excluded. In particular, the absolutization of the principle of non-contradiction has led to the exclusion of alternative modes of being and logical pluralities. Indeed, as Heidegger also stated, this situation has resulted in the systematic suppression of the ontological difference of being in Western thought (Heidegger, 1977).

According to Heidegger, Aristotle’s logic and its principles are not “universal” or “timeless” rules, but rather the products of a specific historical period, namely the beginning of Western metaphysics. Therefore, questioning these principles is directly related not only to logic but also to the fundamental question of philosophy, “What is being?” (Polt, 1999). Heidegger’s aim is to make it possible to rethink this question by freeing it from the framework imposed by the principles of reason.

Thus, while Heidegger criticizes the principles of reason, he aims not only at a logical reform but also at the reestablishment of the relationship between being and thought. His arguments are directed not at the formal structure of Aristotle’s logic, but at the understanding of being on which this structure is based and which is often accepted without question. Therefore, Heidegger’s thought can be evaluated as a critique of ontology that questions the limits of logic.

As a result, the principles of reason in Aristotelian logic should not be considered merely as technical principles of rational thinking, but as constitutive structures that determine the historical foundations of the understanding of being. These principles have legitimized the representative-essentialist nature of Western metaphysics by establishing an implicit identity relationship between thought and being. This shows that they are positioned in a position that determines the direction of philosophy on a historical-ontological level.

4. Conclusion

The intellectual legacy of Heideggerian criticism is meaningful in the context of both extreme perspectives. On the one hand, Gadamer reestablished the hermeneutic movement between the activity of knowing and the experience of history and time in the relationship of “truth and method.” Thus, the transhistorical universality of *logos* was replaced by the dialogue of understanding within tradition (Gadamer, 1960/2013).

Derrida and Deleuze analyzed the principles of identity and non-contradiction through the logic of *différance* and difference, and carried the path opened by Heidegger to a post-structuralist line (Derrida, 2016; Deleuze, 1968/1994). In the analytical tradition, Hintikka’s questioning logic, Dummett’s theory of meaning based on use, and Brandom’s pragmatic-inferential origin inference model have been the source of new functions attributed to the principles of reason (Hintikka, 2013; Dummett, 2014; Brandom, 1994).

On the other hand, objections have been raised that the Heideggerian paradigm could open the door to “irrationalism,” devalue the ideal of scientific certainty, and serve to legitimize totalitarian discourses in the political arena (Thomson, 2005). Heidegger’s attitudes during his 1933-1934 rectorship have shown how the rejection of the principles of reason could lead to risky outcomes in political decision-making. Thus, the rise of unscientific dogmas was considered parallel to the weakening of formal-logic-based control mechanisms and was subject to serious criticism.

This study shows that the principles of reason in Aristotle’s logic have worked not only as norms of logical validity in the history of thought, but also as metaphysical frameworks that shape the understanding of being. Heidegger has revealed the aspects of this framework that render *Dasein*’s mode of existence invisible. On the one hand, he has brought a critical consciousness to the formal-methodological aspect of *logos*. On the other hand, Heidegger has based the value of truth on the phenomenon of “revealing”. The productivity of criticism can be observed in keeping thought dynamic regarding its own limitations; its risk can be observed in the possibility of depriving scientific-rational discourse of certainty. In this

respect, logic can contribute to thinking in the broadest sense as long as it is in a productive tension between the dialogical horizon of phenomenological hermeneutics and the meticulous control of formal science.

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Determination of Foreign Students' Perceptions of Turkish Cuisine

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Abstract: Today, gastronomy tourism has become one of the main alternative tourism forms that attract attention and development by increasing its share in the tourism industry. Countries generate significant tourism income through their gastronomic values. This situation increases the interest in the use of culinary culture as a tool in tourism promotion day by day. In the formation of eating and drinking habits and culinary culture; geographical conditions, climatic characteristics, local products and interaction with different cultures play a decisive role. The foundations of Turkish culinary culture were laid in Central Asia, and in the historical process, it has interacted with Arab culture with the adoption of Islam and has also been significantly influenced by the ancient civilisations of Anatolia. This interaction with different cultures has contributed to the diversification of Turkish cuisine over time and enriched it with many unique flavours. As a result of this historical accumulation, Turkish cuisine has gained a unique identity with its wide range of products, various cooking techniques, unique presentation styles and eating and drinking habits. Researches reveal that Turkish cuisine is one of the three richest cuisines in the world. In this context, 'cuisine', i.e. local food and beverages, is one of the most important elements of Turkey's touristic richness. In this respect, this study aims to examine the perceptions and evaluations of foreign students studying in Turkey towards Turkish culinary culture. In line with this purpose, quantitative research method was adopted to obtain primary data in the study and questionnaire technique was used as a data collection tool. The population of the study consists of foreign students studying at Balıkesir University who have experienced Turkish food. Within the scope of the research, 154 questionnaire forms were obtained and analysed. As a result of the research, it was determined that the general opinions of foreign students studying in Turkey about Turkish food and their perceptions towards Turkish cuisine are largely positive. In addition, it was concluded that there was a significant positive development in the perceptions of foreign students towards Turkish cuisine with the increase in the duration of their stay in Turkey.

Keywords: Turkish Cuisine, Foreign Students, Gastronomy Tourism.

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1. INTRODUCTION

Today, gastronomy tourism has become one of the main alternative tourism forms that attract attention and development by increasing its share in the tourism industry. Countries generate significant tourism income through their gastronomic values. This situation increases the interest in the use of culinary culture as a tool in tourism promotion day by day. In the formation of eating and drinking habits and culinary culture; geographical conditions, climatic characteristics, local products and interaction with different cultures play a decisive role. The foundations of Turkish culinary culture were laid in Central Asia, and in the historical process, it has interacted with Arab culture with the adoption of Islam and has also been significantly influenced by the ancient civilisations of Anatolia. This interaction with different cultures has contributed to the diversification of Turkish cuisine over time and enriched it with many unique flavours. As a result of this historical accumulation, Turkish cuisine has gained a unique identity with its wide range of products, various cooking techniques, unique presentation styles and eating and drinking habits. Researches reveal that Turkish cuisine is one of the three richest cuisines in the world. In this context, 'cuisine', i.e. local food and beverages, is one of the most important elements of Turkey's touristic richness.

Turkey has an important place among the world cuisines with its rich historical background and multicultural structure. Especially in recent years, developments in the field of gastronomy tourism have increased the international recognition of Turkish cuisine (Yıldız & Güneş, 2020). In this context, foreign students studying in Turkey have direct contact with Turkish culinary culture, creating a cultural interaction environment and contributing to the spread of this culture. Foreign students' perceptions and evaluations of Turkish cuisine reflect not only their individual experiences but also the quality of intercultural communication (Demir & Karaca, 2019).

The increase in the number of international students coming to Turkey for higher education makes it necessary to examine their social and cultural adaptation processes more closely. In this process, culinary culture serves as an important bridge in the relationship that individuals establish with a new society (Kaya & Uğur, 2021). Positive or negative perceptions of Turkish cuisine can affect students' general impressions of Turkey, as well as determine their level of cultural attachment and belonging. Therefore, examining foreign students' perceptions of Turkish culinary culture offers an important research area in terms of both cultural interaction and internationalisation policies.

Many studies on Turkish cuisine generally focus on the consumption habits of locals or the experiences of tourists in the context of gastronomy tourism. However, research on the perspectives of foreign students who live in Turkey for a long time and interact directly with Turkish cuisine is quite limited (Özgen & Yaman, 2014; Çetin et al., 2017; Girgin et al., 2017; Yılmaz & Demir, 2021; Kaya, 2023; Kara, 2025). Therefore, the findings of this study will both contribute to the academic literature and help higher education institutions to develop policies to manage the cultural adaptation processes of international students.

In addition, positive perceptions of Turkish cuisine are also important for these students to represent Turkey in a more positive way and to become cultural ambassadors when they return to their countries. The cultural contact established through food is not only limited to taste, but also contributes to values such as mutual understanding, tolerance and multiculturalism (Bilgin, 2022). Therefore, this study serves not only to analyse individual perceptions but also to develop intercultural dialogue.

In this study, it is aimed to analyse the perceptions and evaluations of foreign students studying higher education in Turkey towards Turkish culinary culture. In this direction, answers to the following research questions will be sought:

- How do foreign students perceive and evaluate Turkish culinary culture?
- What are the opinions of foreign students about Turkish cuisine?
- Do foreign students' perceptions of Turkish cuisine vary according to their gender?
- Do foreign students' perceptions of Turkish cuisine vary according to their gender?
- Do the perceptions of foreign students about Turkish cuisine vary according to their ages?
- Do foreign students' perceptions of Turkish cuisine vary according to their nationality?
- Do foreign students' perceptions of Turkish cuisine vary according to their grades?
- Do foreign students' perceptions of Turkish cuisine vary according to their faculties?
- Do foreign students' perceptions of Turkish cuisine vary according to the duration of their stay in Turkey?
- Do foreign students' perceptions of Turkish cuisine vary according to the frequency of eating and drinking out?

2.2. Gastronomy Tourism

Although the concept of gastronomy has been defined in different ways by many authors, most of the existing definitions are considered to be insufficient to fully reflect the scope of gastronomy. Gastronomy is basically concerned with the pleasure and enjoyment of food and drink; therefore, it is stated in the related field that the subject of gastronomy is human. In addition, gastronomic values are not limited to individual pleasure, but are based on a wide variety of bases such as cultural, social, geographical and social nutrition factors (Deveci, et al. 2013).

Today, with the increasing importance and interest in food and beverage culture, the concept of gastronomy is recognised as a fundamental element of cultural attractiveness and is evaluated in the context of cultural values of countries (Richards, 2002; Küçükömrürler et al., 2018). It is seen that the fact that eating and drinking activities are a basic need and the desire of tourists to fully enjoy their experiences during their travels make gastronomy values an indispensable element of tourism experiences. The importance of these gastronomic values, especially for some tourists, is one of the main factors shaping their travel preferences and paves the way for the development of gastronomy tourism (Onur, 2021). Today, gastronomy tourism has become one of the main alternative forms of tourism that attracts attention and develops by increasing its share in the tourism industry. Countries generate significant tourism income through their gastronomic values (Gülen, 2017). This situation increases the interest in the use of culinary culture as a tool in tourism promotion day by day (Akmeşe & Cihangir, 2025). Gastronomy tourism is one of the concepts in the tourism literature that defines travel mobility carried out in order to witness the production processes of different and unique foods and to experience these products. Gastronomy tourism is accepted as an alternative type of tourism because it includes elements such as culture, value, identity, tradition, lifestyle and eating and drinking habits (Yun et al., 2011). Gastronomy tourism is a form of tourism that involves visiting food producers, food festivals, restaurants and special places in order to taste a special type of food or witness the production process of a food as the main motivation factor (Hall et al., 2003). The local food of a region plays an important role both in the preference of that region and in shaping the experiences of tourists in the region. In addition, gastronomy tourism refers to tourists travelling to have unique experiences related to local food and beverages rather than just eating in restaurants and hotels (Birdir & Akyol, 2015).

Geographical differences lead to changes in social culture as well as the values, habits and culinary culture of that society, and this process leads to the formation of unique gastronomic structures of regions, regions, cities and countries. While cities and countries recognised within the scope of gastronomy tourism attract the attention of tourists from all over the world, within the scope of gastronomy tourism, visitors gain unique and unforgettable cultural experiences by experiencing not only the natural or artificial historical elements of the city, but also local food, beverages, traditions and values, and transfer these experiences to their own communities (Eren, 2007; Hatipoğlu, 2010). The desire to taste and try different foods can be the main motivational factor of the travel experience, or it can be considered as a secondary purpose of the total experience (Mckercher et al., 2008). Gastronomy tourism is based on four basic motivations: physical,

cultural, social and prestige. While physical motivation includes eating as a vital need, cultural motivation involves tourists tasting local foods in order to experience local culture. Social motivation refers to the sharing of food within the society and strengthening social ties, while prestige motivation enables tourists to gain social status by sharing their gastronomic experiences. Thus, gastronomy tourism is a unique type of tourism shaped by the combination of multidimensional motivations (Guzman & Canizares, 2011).

1.2. Turkish Culinary Culture

Culinary culture is a cultural structure that includes food, food and beverage types and the materials necessary for the preparation, cooking and storage of these foods, as well as beliefs and practices formed by eating and drinking traditions that vary from region to region (Güler & Olgaç, 2010). All societies in the world have their own culinary culture and dietary patterns that are shaped according to the cultural, geographical, economic, ecological structure and historical process they are in (Çakıcı, 2016). Societies stand out with their different culinary cultures. All kinds of food products consumed or not consumed by a society reveal the cultural values, belief system and social structure of that society. The culinary culture of societies is shaped according to the religious beliefs, geographical and agricultural characteristics, socio-economic conditions and relations with other societies (Beşirli, 2010; Guan, 2015). The change occurring in any of these elements directly affects the culinary culture; as a result of this interaction, culinary cultures are mutually transformed and either enriched or localised within another culinary culture or may disappear over time (Közlme, 2012). Local culinary products differentiate and authenticate the destination they belong to and contribute to the formation of the destination's national brand identity (Hacıoğlu et al., 2009). With this differentiation in culinary cultures, it is seen that three basic concepts that are recognised worldwide have emerged; these are recognition, authenticity and diversity (Taşpınar, 2017). Recognition refers to the fact that the eating and presentation techniques of a dish are known and applied by different cultures; authenticity means that cooking and presentation techniques are completely unique to the country to which it belongs; and diversity refers to the richness of the number of food varieties (Hatipoğlu, 2014). Food plays an important role in introducing the cultural traditions of a region to tourists through its taste and flavour characteristics. In this context, local cuisine contributes to the formation of the general image of the society by directly affecting tourist experiences (Frochot, 2003; Ryu & Jang, 2006).

Thousands of years of historical process starting from Central Asia to today's Anatolia, different geographical and cultural factors have played a decisive role in the formation of Turkish culinary culture. Turkish cuisine, just like the deep-rooted Turkish history, is known for having a rich and diverse structure based on thousands of years of history (Özkaya & Cömert, 2017). The border neighbourhood with Chinese culture in Central Asia, the interaction with Arab culture with the adoption of Islam, and the relations established with Iranian, Hittite, Greek and Mediterranean cultures during the migration to Anatolia have made important contributions to the shaping of Turkish cuisine. One of the main reasons for the diversity of food and beverages in Turkish cuisine is that Turks have a nomadic lifestyle and have interacted with different cultural structures throughout history (Birir, 1990; Albayrak, 2013; Karaman & Girgin, 2023). Turkish cuisine, together with French and Chinese cuisines, is one of the world's oldest and richest cuisines. One of the main reasons why Turkish cuisine is regarded as one of the most distinguished cuisines of the world is that Turks have been able to successfully maintain nomadic lifestyle and sedentary life together in their homeland Central Asia and Anatolia, where they migrated (Talas, 2005; Ertaş & Gezmen Karadağ, 2013). Nomadic lifestyle has brought traditional food preservation and processing techniques such as drying, fermentation, etc. to Turkish cuisine. With the transition to settled life, agricultural products started to be used together with animal products. As a result, both food diversity has increased and durable and delicious food products have emerged (Aydoğdu & Mızrak, 2017). In addition, it is known that the interactions of Turkish society with different cultures in various geographies in different periods in the historical process have greatly shaped the formation of modern Turkish cuisine (Baykara, 2001; Güldemir, 2014).

The foodstuffs in Turkish culinary culture are considered advantageous in terms of their nutritional properties in various aspects. In Turkish cuisine, which does not have a one-way diet, the ability to consume products belonging to different food groups together contributes to the formation of a balanced nutritional structure. However, cooking methods and high fat content of some foods may make these products disadvantageous in terms of healthy nutrition (Baysal, 2002). The natural richness, historical accumulation, cultural diversity and quality agricultural and animal products offered by the geography where we live are considered as the building blocks that form the basis of Turkish cuisine. The opportunities provided by these riches play an important role in the development of the characteristic features of Turkish cuisine. The main characteristics of Turkish cuisine can be listed as follows (Önçel, 2015; Erdoğan Arıcı, 2016; Çakıcı & Eser, 2016; Solmaz & Dülger Altınır, 2018).

- Bread stands out as a staple food in Turkish cuisine,
- Pastries have an important place in Turkish food culture and are widely consumed,
- The use of fat is a determining factor in the cuisine; olive oil is preferred in Western Anatolia, while in other regions, suet, tail fat and milk-based fats are preferred,
- Eating habits are shaped depending on regional traditions and customs,
- In rural areas, naturally growing herbs, roots and mushrooms are widely used in cooking,

- The use of spices is quite common; fresh and dried herbs such as mint, dill and parsley are often preferred,
- Vegetable dishes are usually cooked with meat, tomato paste, onions and tomatoes,
- Although sauce service is not traditionally included in Turkish cuisine, it has been increasing in recent years with the Western influence,
- Yoghurt, either plain or with garlic, is an important complement to meals or as buttermilk,
- In food presentation, visuality is not at the forefront, but flavour is essential,
- Fruits, dried fruits and molasses are used as sweeteners,
- Bulgur is a traditional grain widely used in soups, vegetable dishes and meatballs in Anatolian cuisine.

When the general characteristics of Turkish cuisine are examined, a nutritional structure in which animal and agricultural products are used together is observed. Turkish cuisine has been shaped by socio-cultural factors such as climate, geography, religion, customs, traditions and customs and has been enriched by this diversity. On the other hand, these elements also reveal the main differences that distinguish Turkish cuisine from other culinary cultures. However, Turkish cuisine also plays an important role in the social and cultural interaction of Turkish society with other cultures (Avcıkurt et al., 2007; Karaman & Girgin, 2023).

Especially recently, it is noteworthy that gastronomy tourism has started to take place among alternative tourism types. It is known that a significant portion of tourism revenues in the world is provided by gastronomy tourism (Sarıışık & Özbay, 2015). Considering that Turkish cuisine is among the few cuisines in the world, it is seen that Turkey has sufficient attraction elements for gastronomy tourism (Cömert & Özkaya, 2014). In this context, 'cuisine', i.e. local food and beverages, is one of the most important elements of Turkey's touristic wealth (Ballı, 2016).

2. RELATED RESEARCH

Every year, a large number of foreign students come to Turkey for educational purposes. Foreign students taste and experience Turkish cuisine during their education period. On this subject, different researchers have conducted researches aiming to evaluate the opinions of students who come to Turkey for education about Turkish cuisine. The researches carried out in this framework and the results obtained are summarised below.

Özgen & Yaman (2014) stated that international students studying at Gazi University have generally positive attitudes towards Turkish cuisine and that these attitudes may vary depending on gender and cultural background. In the study, it was reported that soups, meat dishes and desserts played an important role in both the recognition and preference of Turkish cuisine. The importance of socio-cultural integration and length of stay were emphasised among the factors affecting the culinary preferences of individuals from different cultures. Özer, Duran, Hızlı, and Çınar (2014) conducted a study on the perceptions of foreign students coming to Samsun Ondokuz Mayıs University with Erasmus+ education mobility programme about Turkish culture and life. In addition, the students stated that tea is one of the first cultural elements that come to their minds about Turkey; this situation is considered as an indicator of this tendency. Çetin, Bahar, and Griffiths (2017) stated that international students develop positive perceptions of Turkish culture and that this perception is closely related to food culture and that they show great interest in Turkish cuisine, especially baklava, döner and soup types. In the study conducted by Girgin, Oflaz and Karaman (2017), it was tried to determine the opinions of students from Turkic republics about Turkish cuisine. It was determined that they had knowledge about Turkish cuisine and had a positive attitude towards Turkish food. According to the study, soups, stuffing, wraps, ravioli and kebabs are the most liked Turkish dishes by the participants, while pasta, dried legumes, pleasant-compote and pickles are the least liked Turkish dishes. In addition, high prices, too fatty and heavy meals and desserts, high amount of tomato paste and high calories are the features that the participants characterise negatively about Turkish cuisine.

Yılmaz & Demir (2021) stated that Turkish cuisine is highly appreciated in terms of taste and variety among international students, but nutritional value and health perceptions are sometimes questioned by individuals from different cultures. Kaya (2023) revealed that Turkish Cuisine Week activities increased foreign students' awareness of Turkish culture and that these activities contributed positively to their cultural adaptation processes. He emphasised that desserts and traditional drinks facilitate adaptation and increase social sharing among international students. It was revealed that attitudes and perceptions towards Turkish cuisine among international students strengthened as the length of stay in Turkey increased. Kavas and Öncel (2023) examined the attitudes of foreign students of Anadolu University Faculty of Tourism towards Turkish coffee consumption and concluded that foreign students who consume Turkish coffee generally prefer Turkish coffee with sugar, find its visual presentation in stylish cups special and attractive, and will prefer to consume Turkish coffee when they return to their countries. In a study conducted by Kara (2025) at Çankırı Karatekin University, it was stated that the majority of students evaluated Turkish cuisine positively, liked the food and recommended it. It was concluded that digital resources and social media platforms play an important role in recognising Turkish cuisine and that these channels are the best ways to promote Turkish cuisine.

3. METHOD

In this study, it is aimed to examine the perceptions and evaluations of foreign students studying higher education in Turkey towards Turkish cuisine culture. Within the scope of the research, it is assumed that foreign students' perceptions of Turkish cuisine will show a significant difference according to their socio-demographic characteristics. In this framework, the hypotheses of the research developed after the related literature review are presented below.

H1: There is a significant difference between the gender of foreign students and their perceptions of Turkish cuisine.

H2: There is a significant difference between the ages of foreign students and their perceptions of Turkish cuisine.

H3: There is a significant difference between the nationalities of foreign students and their perceptions of Turkish cuisine.

H4: There is a significant difference between the classes of foreign students and their perceptions of Turkish cuisine.

H5: There is a significant difference between foreign students' perceptions of Turkish cuisine and their faculties.

H6: There is a significant difference between the duration of foreign students' stay in Turkey and their perceptions of Turkish cuisine.

H7: There is a significant difference between foreign students' frequency of eating out and their perceptions of Turkish cuisine.

3.1. Population and Sample

The general population of the research consists of foreign students who are studying higher education in Turkey and who have experienced Turkish food. Obtaining the data by reaching the entire population is called general data collection, while using a part of the population in the research is called partial data collection. General data collection management is superior to partial data collection in terms of giving a precise idea about the population, but this method is more difficult to apply in terms of time-consuming and costly (Yüksel & Yüksel, 2004). For this reason, it was preferred to collect the data by determining the sample group in this study. The sample group of the study, i.e. the accessible population, was determined as foreign students studying at Balıkesir University and who have experienced Turkish food. According to the information obtained from Balıkesir University Rectorate Student Affairs Department, there are 900 foreign students actively enrolled in the 2024-2025 academic year. However, since some units of the university (1 faculty, 1 colleges, 11 vocational colleges) are located in different districts, the sample group of the study was limited to foreign students studying at faculties (13) and vocational colleges (1) in the central districts of Balıkesir (Altıeylül ve Karesi). According to the information obtained from Balıkesir University Rectorate Student Affairs Department, there are 618 foreign students actively studying in the units located in the central districts of Balıkesir in the 2024-2025 academic year. Deliberate (purposive) sampling technique was used in the study. The sample size was calculated based on the population calculation formulated for quantitative studies accepted in the literature and it was calculated that the sample size should be at least 234 (Altunışık et al., 2012: 137). Foreign students who wanted to participate in the survey from this population were included in the sample and as a result of the research, a sample group of 154 people in total was reached. It was observed that the reason for not reaching a sufficient sample group was that the majority of the foreign students did not attend the courses regularly and did not volunteer to fill out the questionnaire form, although they appeared to be actively enrolled.

3.2. Data Collection Tools and Techniques

In the study, quantitative research approach was adopted and questionnaire technique was used to collect primary data. The questionnaire form was developed based on the theoretical information obtained from the literature review. The questionnaire form used in the research consists of three parts. In the first part of the questionnaire form, there are a total of 9 questions designed to determine the socio-demographic characteristics of the foreign students participating in the study. In the second part of the questionnaire form, there is a scale consisting of 20 items developed by Giritlioğlu and Karaman (2017) to determine the opinions of foreign students about Turkish food. This scale, which was developed to measure the opinions of domestic tourists about Gaziantep food, was adapted to Turkish food. In the study conducted by Giritlioğlu and Karaman (2017), the Cronbach Alpha reliability value of the scale was calculated as 0.798. In the third part of the questionnaire form, there is a scale consisting of 14 items developed by Giritlioğlu and Karaman (2017) to determine the perceptions of foreign students about Turkish cuisine. This scale, which was developed to measure tourist perception of Gaziantep cuisine, was adapted to Turkish cuisine and used. Giritlioğlu and Karaman (2017) determined 3 dimensions related to the scale in their study and calculated the Cronbach Alpha reliability value of the scale as 0.876 Cronbach Alpha. In the second and third sections of the questionnaire form, a five-point Likert-type rating method was used in line with the relevant scales. This rating is structured with the options '1= Strongly disagree', '2= Disagree', '3= Undecided', '4= Agree' and '5= Strongly agree'. In the analysis phase, the arithmetic averages of the answers given by the participants were calculated. The fact that the average is close to '1' indicates that the perception of Turkish cuisine is at a low level, and the fact that it is close to '5' indicates that this perception is at a high level. The questionnaire form

prepared for the application of the research was prepared in printed form. At the same time, the questionnaire form was created online to speed up the data collection process and was distributed in May 2025.

3.3. Data Analysis

The data obtained from the participants were analysed through SPSS. In the analysis process, firstly, the reliability and construct validity of the scales used in the research were evaluated. Then, the conformity of the data to normal distribution was tested by examining skewness and kurtosis values. Descriptive statistics were obtained by calculating the frequency, arithmetic mean and standard deviation values for the items in the scale. Following the evaluation of the normality assumption, appropriate difference tests were applied to test the hypotheses.

4. FINDINGS

The study was conducted to determine the perceptions of international students studying at Balıkesir University regarding Turkish cuisine. The survey form included questions aimed at identifying the demographic characteristics of the participants, as well as two scales: the General Thoughts About Turkish Food Scale consisting of 20 items, and the Perceptions of Turkish Cuisine Scale consisting of 14 items. Both scales were prepared using a 5-point Likert scale format (1 = Strongly Disagree, 5 = Strongly Agree). The data collected from a total of 154 participants were examined for normality through skewness and kurtosis values using SPSS-30. The skewness (-0.018 to -0.850) and kurtosis (-0.002 to -0.777) values for the General Thoughts About Turkish Food Scale, and the skewness (-0.621 to -1.164) and kurtosis (-0.055 to 1.217) values for the Perceptions of Turkish Cuisine Scale indicated that the data were within the acceptable range of ± 1.5 for normal distribution (Kline, 1998, p. 77; Tabachnick & Fidell, 2007, p. 79).

The demographic characteristics of the participants are presented in Table 1. Among the participants, 67 (43.5%) were female, and 87 (56.5%) were male. Most respondents (51.9%) were between the ages of 16 and 18. Regarding nationality, 62 participants (40.3%) were from Kazakhstan and 41 (26.6%) were from Azerbaijan. In terms of academic year, most participants were first-year students (51.3%). Faculty distribution indicated that 26 participants (16.9%) were from the Faculty of Economics and Administrative Sciences, 25 (16.2%) from Necatibey Faculty of Education, 25 (16.2%) from the Faculty of Tourism, and 24 (15.6%) from the Faculty of Arts and Sciences. Furthermore, 64 students (41.6%) had been residing in Türkiye for less than one year. In terms of eating habits, 52 participants (33.8%) reported dining out 2 to 3 times per month, excluding meals consumed at the campus or dormitory cafeterias.

Table 1: Demographic Information of Participants

Gender	n	%	Faculty / School	n	%
Female	67	43.5	Faculty of Science and Letters	24	15.6
Male	87	56.5	Faculty of Economics and Administrative Sciences	26	16.9
Age	n	%	Faculty of Engineering	7	4.5
16–18	80	51.9	Necatibey Faculty of Education	25	16.2
19–20	53	34.4	Faculty of Health Sciences	17	11.0
21 and above	21	13.6	Faculty of Sport Sciences	20	13.0
Country	n	%	Faculty of Medicine	2	1.3
Kazakhstan	62	40.3	Faculty of Tourism	25	16.2
Uzbekistan	20	13.0	Faculty of Veterinary Medicine	7	4.5
Turkmenistan	6	3.9	Balıkesir Vocational School	1	0.6
Azerbaijan	41	26.6	Duration of Stay in Türkiye	n	%
Kyrgyzstan	6	3.9	Less than 1 year	64	41.6
Egypt	5	3.2	1 year	17	11.0
Afghanistan	2	1.3	2 years	29	18.8
Other*	12	7.8	3 years	16	10.4
Year of Study	n	%	4 years	17	11.0
1st Year	79	51.3	5 years and more	11	7.1
2nd Year	29	18.8	Frequency of Eating Out	n	%
3rd Year	10	6.5	Once a month	28	18.2
Turkish Prep (TÖMER)	36	23.4	2–3 times a month	52	33.8
			4–5 times a month	26	16.9
			6–7 times a month	15	9.7
			8 times or more a month	33	21.4
Total	154	100	Total	154	100

*Gabon, Chechnya, Indonesia, Lebanon, Iraq, Bulgaria

The mean, standard deviation, reliability, and validity values for the responses provided by the international students participating in the study regarding the General Thoughts About Turkish Food Scale are presented in Table 2. An examination of the arithmetic means and standard deviation values derived from the responses to the 20 items posed to the participants indicates that their general thoughts of Turkish cuisine are at a moderate level ($\bar{x} = 3.36$; s.d. = 0.632). Among the items, participants rated the statements “Turkish dishes are filling” ($\bar{x} = 3.60$; s.d. = 1.077) and “Turkish dishes are visually appealing” ($\bar{x} = 3.54$; s.d. = 0.998) the highest. Conversely, the statement with the lowest average score was “Turkish dishes contain too much meat” ($\bar{x} = 3.01$; s.d. = 1.143). Additionally, the reliability of the scale was found to be high (Cronbach’s $\alpha = 0.90$), and the scale demonstrated strong construct validity (KMO = 0.86; $\chi^2 = 1439.114$, df = 190, $p < 0.001$).

Table 2: Mean, Standard Deviation, Reliability and Validity Values of the General Thoughts about Turkish Foods

Items	$\bar{x}$	Std.
It is high in calories.	3,2237	1,03024
It has a rich variety of dishes.	3,4248	1,13006
It is delicious.	3,5034	1,08087
It is visually appealing.	3,5473	,99892
It is filling.	3,6014	1,07703
It is appetizing.	3,5168	,99413
It contains too much meat.	3,0132	1,14325
It has a pleasant smell.	3,3311	1,01442
It suits the palate.	3,4172	,95217
It is nutritious.	3,3758	,99985
It is spicy.	3,4247	,96903
It contains excessive onion and garlic.	3,3425	1,02542
It is too greasy.	3,2416	1,06428
It is healthy.	3,5338	1,16269
It is hygienic.	3,3034	1,03105
It is sauce-based.	3,3133	,99105
Its desserts are overly sweet.	3,4800	1,05235
Its desserts are overly oily.	3,3311	1,02510
It is salty.	3,2148	1,09403
It is easy to digest.	3,2215	1,09572
Total Mean and Std. Deviation	3,3681	,63287
Cronbach’s Alpha	0,90	
Kaiser-Meyer-Olkin Measure of Sampling Adequacy	0,86	
Bartlett’s Test of Sphericity	$\chi^2=1439,114$, df=190, $p<0,001$	

The mean, standard deviation, reliability, and validity values for the responses provided by the international students participating in the study regarding the Perceptions of Turkish Cuisine Scale are presented in Table 3. An examination of the arithmetic means, and standard deviation values calculated from the responses to the 14 items indicates that the participants' overall perceptions of Turkish cuisine are at a high level ($\bar{x} = 3.66$; s.d. = 0.871). Among the statements, the ones with the highest average scores are: “Festivals and competitions promoting Turkish culinary culture at the international level should be organized” ($\bar{x} = 3.79$; s.d. = 1.062), “Turkish cuisine includes flavors that are recognized both nationally and globally” ($\bar{x} = 3.78$; s.d. = 1.045), and “Turkish cuisine plays a significant role in increasing the number of visitors to Türkiye” ($\bar{x} = 3.78$; s.d. = 1.123). On the other hand, the item with the lowest mean score is “Educational institutions have a major responsibility in preserving and passing on Turkish culinary culture to future generations” ($\bar{x} = 3.45$; s.d. = 1.046). Furthermore, the scale demonstrated high reliability (Cronbach’s $\alpha = 0.95$) and strong construct validity (KMO = 0.94; $\chi^2 = 1774.810$, df = 91, $p < 0.001$).

Table 3: Mean, Standard Deviation, Reliability and Validity Values of the Perceptions of Turkish Cuisine Scale

Items	$\bar{x}$	Std.
Turkish cuisine is important for Turkish tourism.	3,7815	1,24141
Turkish cuisine enhances the country's brand perception.	3,6291	1,12381
Turkish cuisine is a significant element in shaping the country’s image.	3,6490	1,13298
Turkish cuisine plays an important role in gaining a sustainable competitive advantage for the country.	3,7533	1,07823
Turkish cuisine contributes to the increase in the number of visitors to Türkiye.	3,7895	1,12390
Türkiye generates more income thanks to its culinary culture.	3,5430	1,11282
Turkish culinary culture plays an important role in spreading tourism activities throughout the year.	3,5705	1,08619
Festivals and competitions promoting Turkish culinary culture at the international level should be organized.	3,7933	1,06210

Educational institutions have a major responsibility in preserving and transferring Turkish culinary culture to future generations.	3,4539	1,04687
Turkish culinary culture should be promoted more effectively.	3,5960	1,04274
Commercial food and beverage enterprises providing service in the country are important in terms of their number and variety.	3,6250	1,08954
Commercial food and beverage businesses offering Turkish cuisine are in higher demand compared to other food and beverage establishments.	3,5811	1,02271
Turkish culinary culture encourages tourists to shop more.	3,7400	1,11103
Turkish cuisine includes flavors that are recognized both nationally and globally	3,7895	1,04557
Total Mean and Std. Deviation	3,6639	,87143
Cronbach's Alpha	0,95	
Kaiser-Meyer-Olkin Measure of Sampling Adequacy	0,94	
Bartlett's Test of Sphericity	$\chi^2=1774,810$, df=91, p<0,001	

Foreign students participating in the study were asked to list the Turkish foods and beverages they were familiar with, as well as their favorite Turkish foods and beverages. These findings, collected through two different open-ended questions, are presented in Table 4. According to the results, the most well-known Turkish foods and drinks among the international students were Lentil Soup (13.16%), Baklava (10.85%), Pilaf (7.39%), and Ayran (5.77%). The most favored items included Baklava (20.85%), Lentil Soup (9.77%), Ayran (8.14%), Doner (6.19%), and Pilaf (5.54%). Additional information regarding other commonly known and most liked Turkish foods and beverages are provided in the table.

Table 4: The Most Known and Most Favored Foods and Beverages of Turkish Cuisine

Most Known Foods and Beverages	n	%	Most Favored Foods and Beverages	n	%
Lentil Soup	57	13,16	Baklava	64	20,85
Baklava	47	10,85	Lentil Soup	30	9,77
Pilaf	32	7,39	Ayran	25	8,14
Ayran	25	5,77	Doner	19	6,19
Doner	20	4,62	Pilaf	17	5,54
Lahmacun	14	3,23	Rice Puding	13	4,23
Künefe	13	3,00	Tea	12	3,91
Tea	12	2,77	Turkish Coffee	10	3,26
Ezogelin Soup	12	2,77	Meatball	10	3,26
Höşmerim	11	2,54	Lahmacun	10	3,26
Meatball	11	2,54	Künefe	9	2,93
Pita	11	2,54	Höşmerim	8	2,61
Meat Soup	10	2,31	İskender Kebab	7	2,28
İskender Kebab	10	2,31	Manti	7	2,28
Turkish Coffee	10	2,31	Pita	7	2,28
Manti	10	2,31	Börek	6	1,95
Yaprak Sarma	10	2,31	Çiğ Köfte	5	1,63
Rice Puding	10	2,31	Tomato Soup	4	1,30
Cacik	9	2,08	Ezogelin Soup	4	1,30
Kadayıf	6	1,39	Kadayıf	4	1,30
Kadınbudu Meatballs	6	1,39	Yaprak Sarma	4	1,30
Moussaka	6	1,39	Adana Kebab	3	0,98
Turnip	6	1,39	Dolma	3	0,98
Beans	6	1,39	Dürüm	3	0,98
Börek	5	1,15	Fish	2	0,65
Dolma	5	1,15	Cacik	2	0,65
Dürüm	5	1,15	İzmir Bomb	2	0,65
Adana Kebab	4	0,92	Kokoreç	2	0,65
Çiğ Köfte	4	0,92	Moussaka	2	0,65
Yayla Soup	4	0,92	Chickpea	2	0,65
Tomato Soup	3	0,69	Ottoman Sherbet	2	0,65
Others*	39	9,01	Others**	9	2,93
Total	433	100	Total	307	100

*Katmer, Kokoreç, Chickpeas, Ottoman Sherbet, Milk Halva, Pickles, Fish, Meat Bread, Imam Bayıldı, İzmir Bomb, Karnıyarık, Keşkek, Menemen, Kumpir, Kemalpaşa Dessert, Urfa Kebab, Tripe Soup, Simit, Gözleme, Kısır.

**Opma, Meat Soup, Kadınbudu Meatballs, Lentil Meatballs, Sote, Milk Halva, Tarhana Soup, Pickles.

To test the hypotheses proposed in the study, difference tests were used. Independent Samples T-Test and One-Way ANOVA were conducted to determine whether there were statistically significant differences between participants' gender, age, nationality, year of study, faculty, length of stay in Türkiye, and frequency of dining out, in relation to their perceptions with Turkish cuisine. The analyses revealed that a statistically significant difference existed only between the length of stay in Türkiye and perceptions of Turkish cuisine ($p < 0.05$). The results of the analysis are presented in Table 5. To identify which specific categories contributed to the significant difference in relation to the length of stay in Türkiye, a post hoc test was conducted. Since the Levene's test indicated the assumption of homogeneity of variances was met, the LSD test was used. According to the results, participants who had been living in Türkiye for 2 and 3 years reported significantly higher levels of perceptions of Turkish cuisine compared to those who had been living in Türkiye for only 1 year.

Table 5: The Relationship Between Length of Stay in Türkiye and Perceptions of Turkish Cuisine

		n	$\bar{x}$	Std.D.	F	p	Difference
Length of Stay in Türkiye	Less than 1 year	64	3,4009	,99697	2,331	0,45	2 years > 1 year
	1 year	17	3,8290	,80096			
	2 years	29	3,8294	,73547			3 years > 1 year
	3 years	16	4,0587	,41103			
	4 years	17	3,7637	,71314			
	More than 5 years	11	3,7743	,94898			
Total		154	3,6639	,87143			

5. CONCLUSIONS AND RECOMMENDATIONS

The findings of the study show that the general opinions of foreign students about Turkish food are positive. The participants stated that Turkish cuisine is a rich cuisine that is delicious, satisfying, appetising and offers a variety of food options. However, the perceptions that Turkish cuisine is high in calories, high in meat content and high in fat are accepted at a moderate level. This situation indicates that while Turkish cuisine is evaluated positively with its traditional taste and satisfying characteristics, it is also open to some criticisms in terms of health and nutrition. These results are in line with some studies in the literature. For example, Aktaş and Çalışkan (2019) stated that Turkish cuisine was generally found delicious and satisfying by foreign tourists, but some participants were concerned about calorie and fat content. Similarly, Yılmaz and Demir (2021) stated that Turkish cuisine is highly appreciated in terms of taste and variety among international students, but nutritional value and health perceptions are sometimes questioned by individuals from different cultures. On the other hand, Çelik et al. (2018) reported that Turkish cuisine is perceived as a nutritious and easy-to-digest cuisine thanks to the use of natural spices and freshness. In this respect, balancing Turkish cuisine in terms of both traditional flavours and cultural richness and modern dietary trends is considered important for the wider acceptance of the cuisine in the international arena.

The research findings also show that the perceptions of foreign students studying in Turkey towards Turkish cuisine are largely positive. The participants do not only see Turkish cuisine as delicious food, but also consider it as a carrier of Turkey's cultural heritage, a competitive advantage in tourism and a tool that strengthens the country's image. This multidimensional value attributed to Turkish cuisine shows that gastronomy is not only an object of consumption, but also an effective cultural communication tool in international relations and promotional strategies. The results of the research also coincide with similar studies in the literature. For example, Üzülmöz and Akdağ (2020) stated that foreign tourists' motivations to experience Turkish cuisine are related to the search for cultural experience and sensory curiosity. Similarly, Kaya (2024) found that Turkish Cuisine Week activities increased foreign students' awareness of Turkish culture and contributed positively to their cultural adaptation processes. Çetin, Bahar, and Griffiths (2017) stated that international students develop positive perceptions of Turkish culture and that this perception is closely related to food culture. In addition, Özgen and Yaman (2014) stated that international students studying at Gazi University have generally positive attitudes towards Turkish food and that these attitudes may vary depending on gender and cultural background. In a study conducted by Kara (2025) at Çankırı Karatekin University, he emphasised that digital resources and social media play an important role in students' recognition of Turkish cuisine and that these platforms can be effective in the international promotion of Turkish cuisine. In this context, it can be said that Turkish cuisine is not only a tourist attraction, but also a holistic cultural value that should be included in Turkey's international promotion strategies. The study offers important implications that Turkey should give more importance to gastronomy-based promotion policies and increase cultural activities in this field.

The findings of the study reveal that foreign students' knowledge and preferences about Turkish cuisine vary. While lentil soup, baklava and pilaf stand out among the most known foods, baklava, lentil soup and ayran are among the most preferred foods. These results show that both hot soups, desserts and traditional beverages have an important place in the perception of Turkish cuisine. Moreover, the fact that various foods such as döner, lahmacun and rice pudding rank high in terms of both recognition and preference indicates that Turkish cuisine offers both satisfying and delicious alternatives. The wide variety of products in the 'other' category supports the richness and regional diversity of the culinary culture.

It is seen that this result obtained in the research is in parallel with the results of some studies in the literature. For example, Çetin, Bahar, and Griffiths (2017) reported that foreign students showed great interest in Turkish cuisine, especially in baklava, döner and soup types. Kaya (2024) emphasised that desserts and traditional drinks facilitate adaptation and increase social sharing among international students. Similarly, Özgen and Yaman (2014) reported that soups, meat dishes and desserts play an important role in both the recognition and preference of Turkish cuisine. In line with these results, in the international promotion strategies of Turkish cuisine, a balanced presentation of both highly known main products and regional and lesser-known flavours will enrich the culinary experience of students and tourists.

When the results of the hypothesis to be measured in the study are evaluated, it is determined that as the length of stay in Turkey increases, foreign students' perceptions of Turkish cuisine develop positively. In particular, the average perception scores of the participants with a stay of 1 year or more were found to be higher than those with a stay of less than one year. In general, it can be said that as the duration of the students' stay in Turkey increases, their level of familiarisation with and interest in Turkish cuisine also increases. It is expected that students who stay in Turkey for a longer period of time will have closer contact with the cuisine and get used to local flavours. This can be explained by both increased integration into the social environment and increased opportunities to try different dishes. It is seen that the results of some studies conducted in the related literature are in parallel with this result. For example, Kaya (2024) found that among international students, attitudes and perceptions towards Turkish cuisine strengthened as the length of stay in Turkey increased. Similarly, Aktaş and Çalışkan (2019) stated that foreign tourists' experiences and satisfaction with local cuisine increased as their length of stay increased. However, Özgen and Yaman (2014) emphasised the importance of socio-cultural integration and length of stay among the factors affecting the culinary preferences of individuals from different cultures. Therefore, long-term experiences play an important role in the promotion and adoption of Turkish cuisine and supporting these processes can contribute to the acceleration of cultural adaptation.v

It is seen that foreign students studying in Turkey develop positive perceptions towards Turkish cuisine, but these perceptions are shaped with some nutritional concerns. In this framework, it is thought that the suggestions presented below will contribute to both the practices to be carried out in the field of gastronomy and cultural promotion and harmonisation processes.

- The healthy aspects of Turkish cuisine (e.g. vegetable dishes, olive oil dishes, use of natural spices) should be emphasised more and these options should be made visible in educational institutions and public dining areas.
- In cooperation with universities and local administrations, events such as cultural food workshops, tasting days and regional cuisine promotions should be organised for international students.
- Elements of Turkish cuisine should be integrated into international promotion policies and promoted more effectively through education fairs, cultural events and digital platforms abroad.
- Regional and lesser-known flavours reflecting the richness of Turkish cuisine should be introduced. In this way, students' gastronomy experiences will be diversified and a more comprehensive view of Turkey's culinary heritage will be developed.
- Digital resources should be used effectively in the process of students obtaining information about the cuisine. Informative content on Turkish cuisine should be shared through social media campaigns, short promotional videos, recipe content and multilingual gastronomy blogs.
- For students coming with short-term exchange programmes, introductory activities about cuisine should be carried out at an early stage and culinary culture should be integrated into the orientation programmes of universities.
- In order to understand the perceptions towards Turkish cuisine in more depth, there is a need for comparative studies to be conducted at different universities with students of different nationalities and cultural backgrounds. Such studies will contribute both to the development of policies that support cultural adaptation processes and to the formation of interdisciplinary approaches in the field of gastronomy.

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Ethics Committee Approval

For this study, Balıkesir University Social Sciences and Humanities Ethics Commission decided on "Ethics Committee Approval" at its meeting dated 23.05.2025 and numbered 2025/05-24.

Author Contributions

Çalışma üç yazarlı olarak hazırlanmıştır. Contribution Rates: 1. Author = 100%, 2. Author = 35%, 3. Author = 30%

Conflict of Interest / Çıkar Çatışması

The authors have no conflicts of interest to declare.

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